# Essentris™
# User Manual

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# Preface

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This document describes Essentris™, the client-server version of the Clinical Information System (CIS). The user interface is Microsoft Windows on a desktop PC. It is intended for readers who are familiar with clinical techniques, medical record keeping, and the Microsoft Windows platform.

## How to Use this Document

Each section of this manual describes how to use an Essentris function. Section 1 is a general introduction to the overall system. The following is a list of the sections in this manual:

- Section 1 - “*Exploring Essentris*” describes the Essentris tool bars, menus, and functionality
- Section 2 - “*Patient Control*” describes the Patient Control screen and patient management
- Section 3 - “*Flowsheets Basics*” describes basic flowsheet functions
- Section 4 - “*Flowsheet Specifics*” describes specialized flowsheet functions
- Section 5 - “*Summary Screens*” describes clinical summary screen functions
- Section 6- “*Patient Notes*” describes patient Notes and Care Plan functions
- Section 7- “*Fetal Plots*” describes Essentris maternal graphical charting features
- Section 8 - “*Newborn Growth Charts*” describes how patient data is displayed on standardized growth charts
- Section 9 - “Waveforms” describes Essentris patient graphical charting features
- Section 10 - “*Tools*” describes Essentris enhanced print options; access to CQL; CheckUpdate, an automatic update feature; and Change Password
- Section 11 - *“Web Links”* describes hospital reference documents and links
- Section 12 - “*Display Options*” describes the Essentris display features
- Section 13 - *“Order Entry”* describes patient order-entry functions
- Section 14 - *“Drug Screening”* describes the Order Entry drug screening facility
- Section 15 - *“IPlots”* describes how to plot one or two flowsheet data items

## About Essentris

Essentris is an online process, designed for the hospital environment, that automates the recording of patient information. Essentris includes the following benefits:

- Replaces handwritten charts.

- Multiple users can access patient information simultaneously.
- Can be configured to individual hospitals, environments, and patients.
- Eliminates redundant charting.
- Reads data from bedside devices and other systems such as lab and ADT.
- Automates calculations such as IV drips and I&O fluids.
- Performs at 100-percent uptime.
- Data is stored for future retrieval and research.

## About this Document

This document describes how to use CliniComp's Clinical Information System in the Windows environment. Although examples of Essentris functions are included, a hospital can customize its environment to meet specific needs. Consequently, screen configurations determined by a hospital might vary from the illustrations presented here.

Note

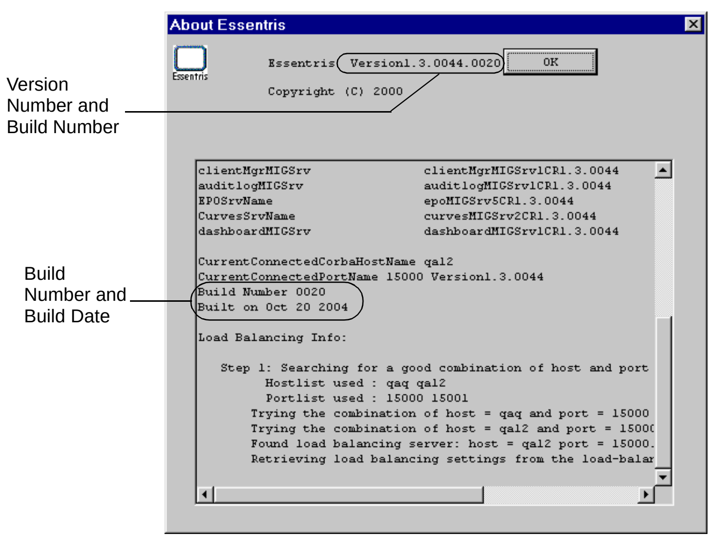
*Essentris is the Windows based CIS system formerly known as WinCIS. If the WinCIS name or logo appears while using the Essentris system, or in this manual, it has the same function and meaning as Essentris and is referred to as Essentris in the text of this manual.*

## References

Essentris includes an online Help function. Help can be accessed with the F1 key, the **Help** menu on the Menu Bar, or by selecting the question mark button on the selected window.

### Essentris Version Number

This manual is based on Essentris version 1.3.0044. To view the version of the Essentris application, open the **Help** menu on the Menu Bar and select **About Essentris**. When the **About Essentris** window opens, the Version number and Build number (the four digits following the version number) are shown near the top of the window. Scroll to the bottom of the display to see the Build number and the Build Date.



# Exploring Essentris

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This section is an overview of Essentris functions and common elements. Throughout the section, references are made to subsequent sections that describe the detailed procedures for the function or feature presented.

## Essentris Common Features

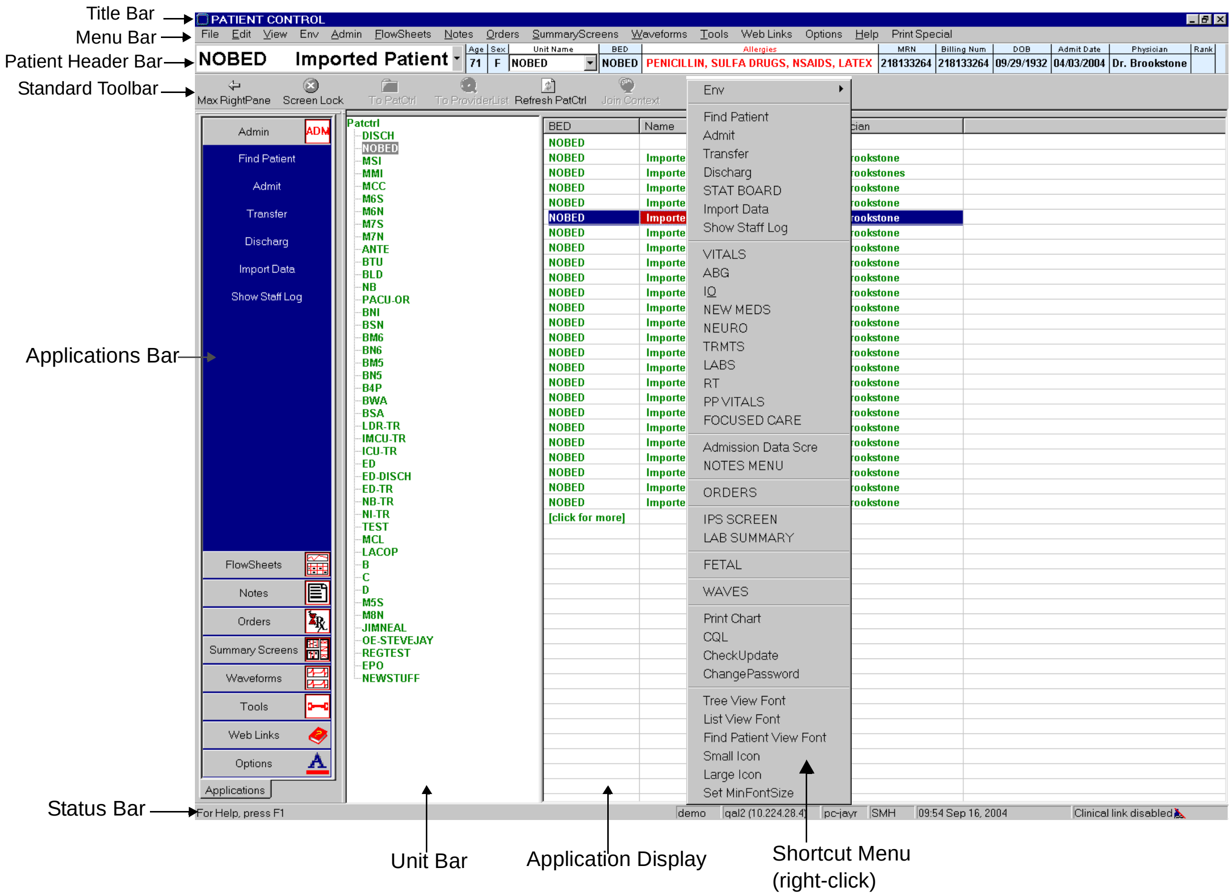
When Essentris is launched, the Patient Control screen, similar to the one shown on page 16, appears. The Patient Control screen displays the patients, units, beds, and applications. The labeled components of the Patient Control screen are defined in the following order:

- Applications Bar beginning on page 17
- Unit Bar beginning on page 19
- Application Display beginning on page 21
- Title Bar beginning on page 21
- Menu Bar beginning on page 21
- Patient Header on page 23
- Standard Toolbar beginning on page 24
- Status Bar beginning on page 25
- Using the Shortcut Menu on page 25
- Date and Time formatting starting on page 25

The following topics are additional navigation tools:

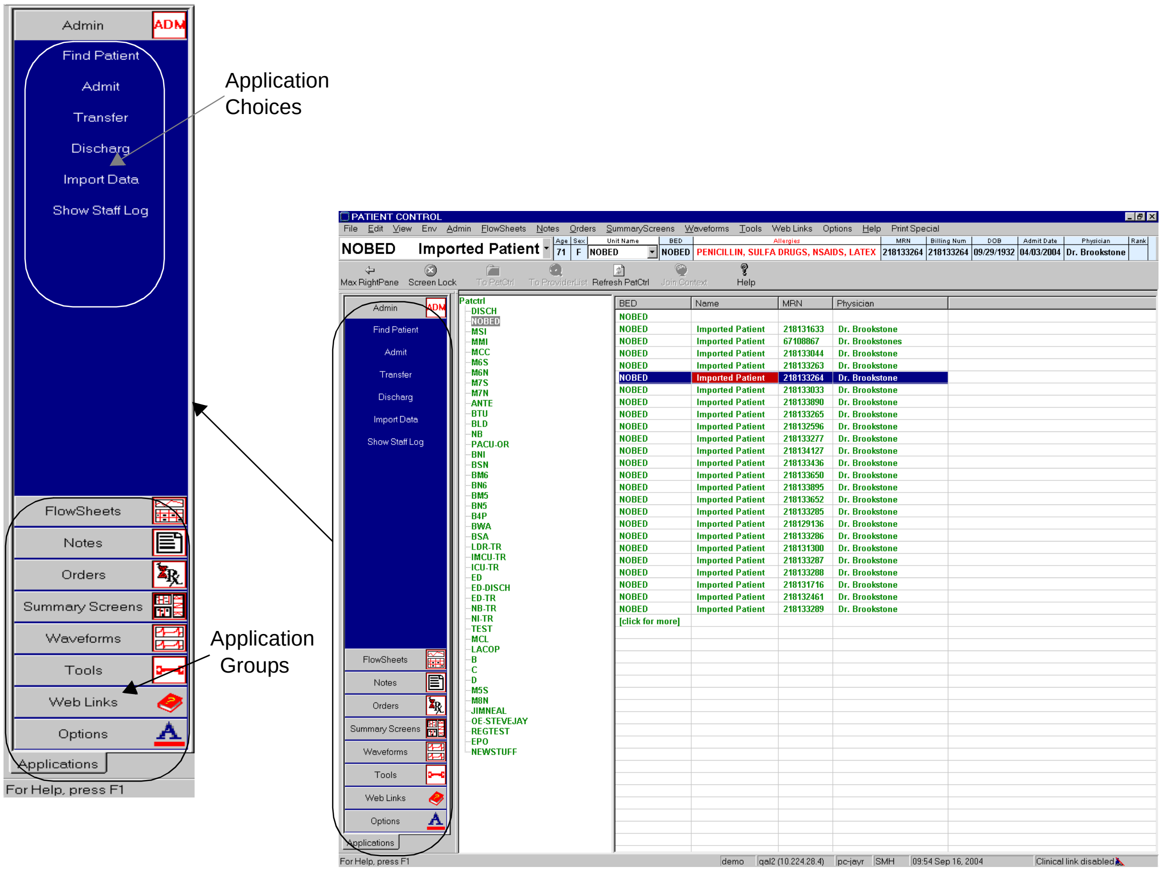
- Using Shortcut Keys on page 22
- Using Keyboard Access on page 26
- Using the Mouse in Essentris on page 26

# Patient Control Screen



## Applications Bar

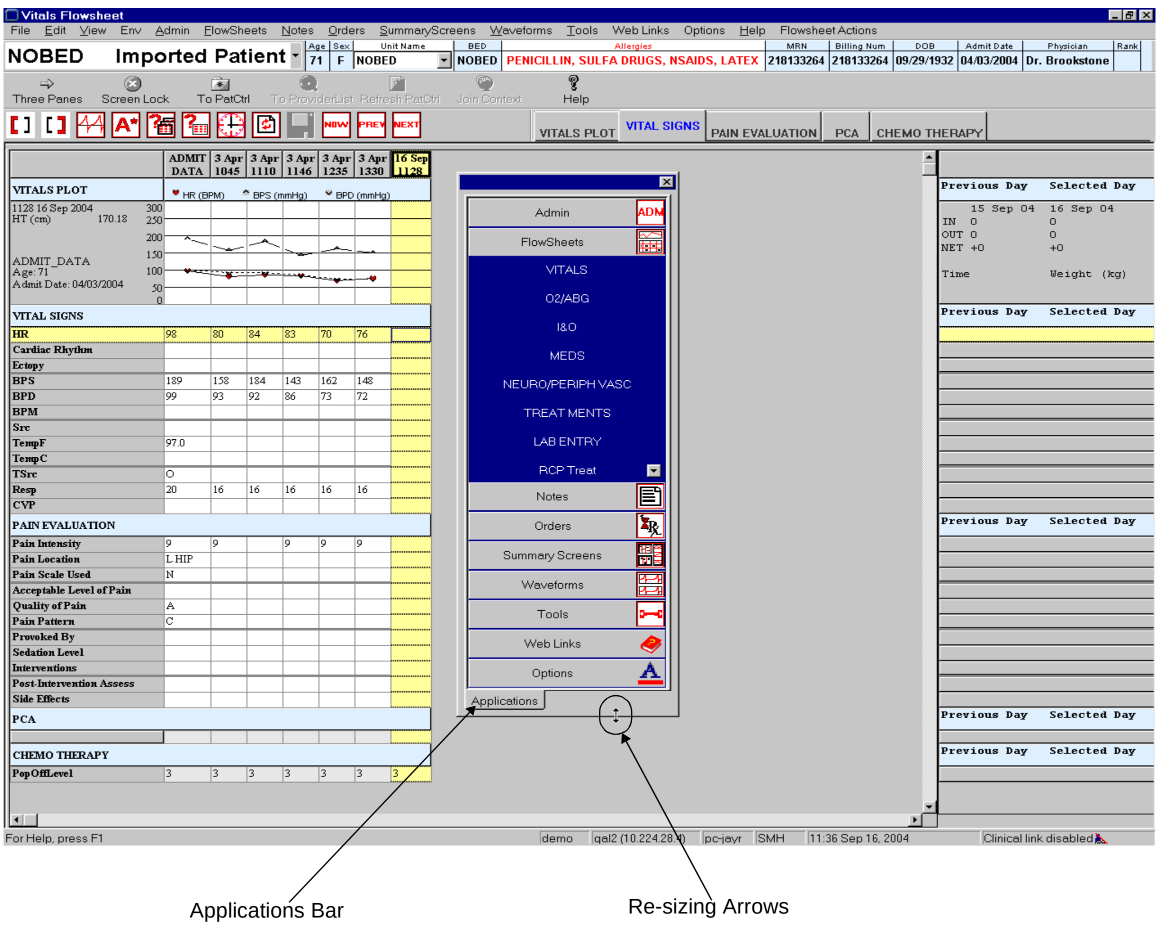
The Applications Bar, displayed at the left of the screen, is a fast way to navigate Essentris. Groups of Applications, which correspond to menus in the Menu Bar, are selected by clicking on their label in the Applications Bar. Application choices appear below the label of the selected group. To start an application choice, click its name in the Applications Bar.




### Moving and Resizing the Applications Bar

At times, you might want the application display to fill the entire window and also be able to see the **Applications Bar**. For example, while you are working with the Vitals Flowsheet, you can switch back to Patient Control, or to another flowsheet, by clicking on the appropriate application name in the **Applications Bar**. Use the following steps to place the **Application Bar** on top of the application display.

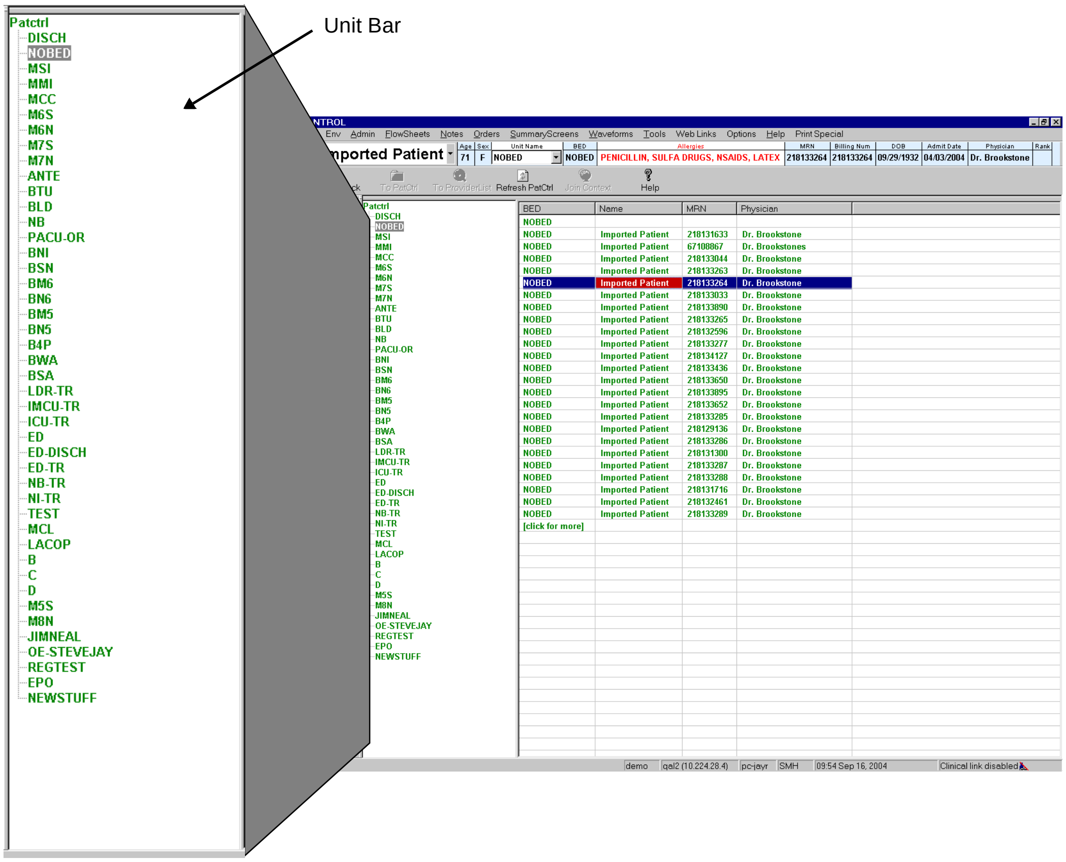
| Step by Step | Additional Information |
|---|---|
| 1. On the **Applications Bar**, place the cursor anywhere on the outer edge of the **Application Bar** and hold down the left mouse button. | |
| 2. Drag the **Applications Bar** to the application display area and release the left mouse button. | The **Applications Bar** becomes smaller when it is dragged and placed in the application display. |
| 3. To resize the **Applications Bar**, click and hold the left mouse button on the outer edge of the **Applications Bar** and drag the edge to change the window size. | The two-headed arrow pointer appears when the mouse is positioned over a window edge. |



## Unit Bar

The Unit Bar is a tree display of unit names. To select a unit and display the assigned patients in the Application Display, click on the unit name in the Unit Bar. Each unit shown in the Unit Bar is also available in the Unit Name choicelist on the Patient Header bar.

Click the unit name to display the list of beds for the unit in the Patient Display. Occupied beds display the name of the patient next to the bed name. To select a patient, click on his/her bed in the Application Display.

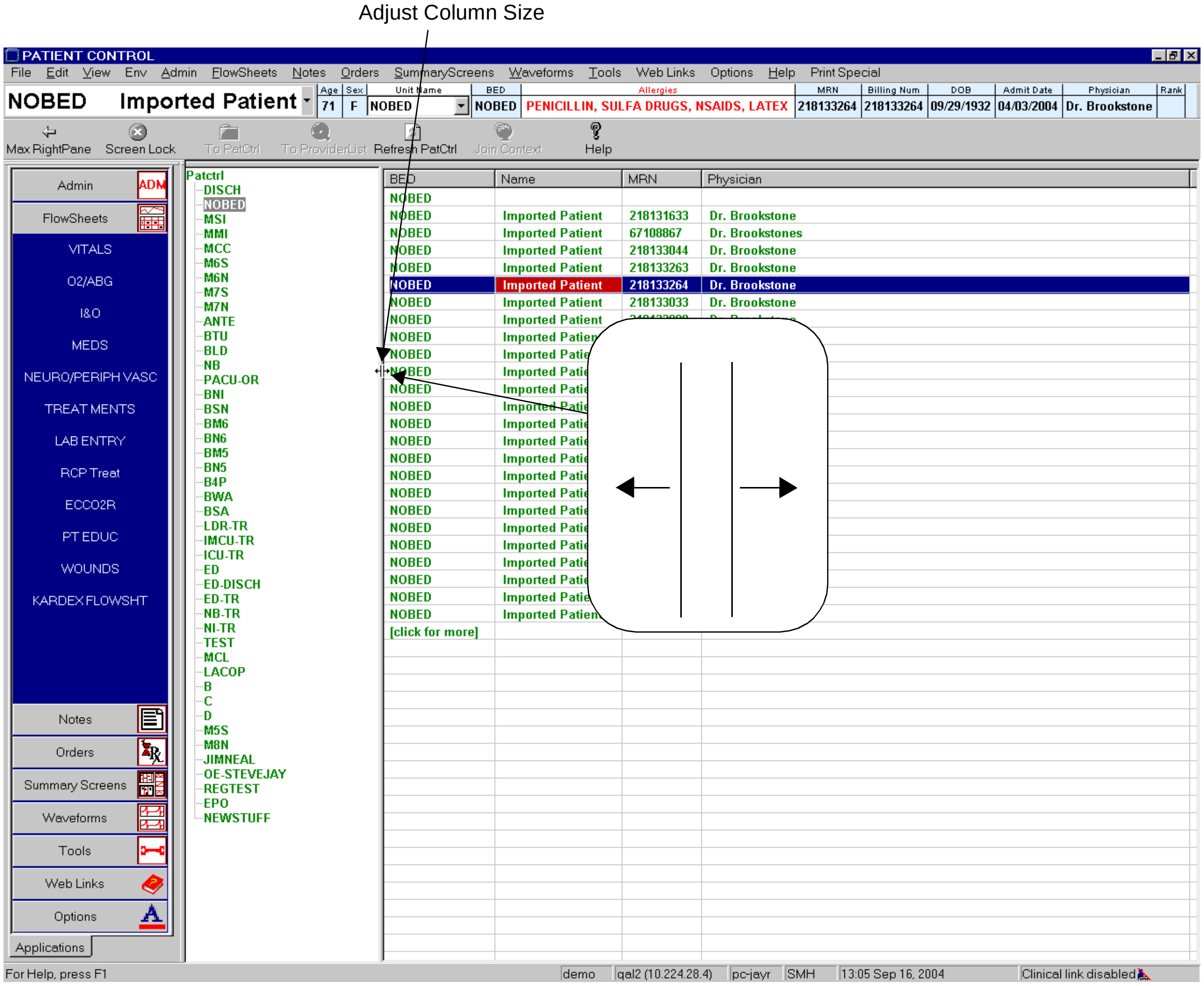


## Resizing the Unit Bar

To change the size of the Unit Bar, perform the following steps:

| Step by Step | Additional Information |
|---|---|
| 1. Move the mouse to the joint between the Unit Bar and application display, so that the pointer becomes two lines with arrows on either side. | |
| 2. Click and drag the mouse to the right or left to resize the Unit Bar. | When the Unit Bar is adjusted, release the left mouse button. |

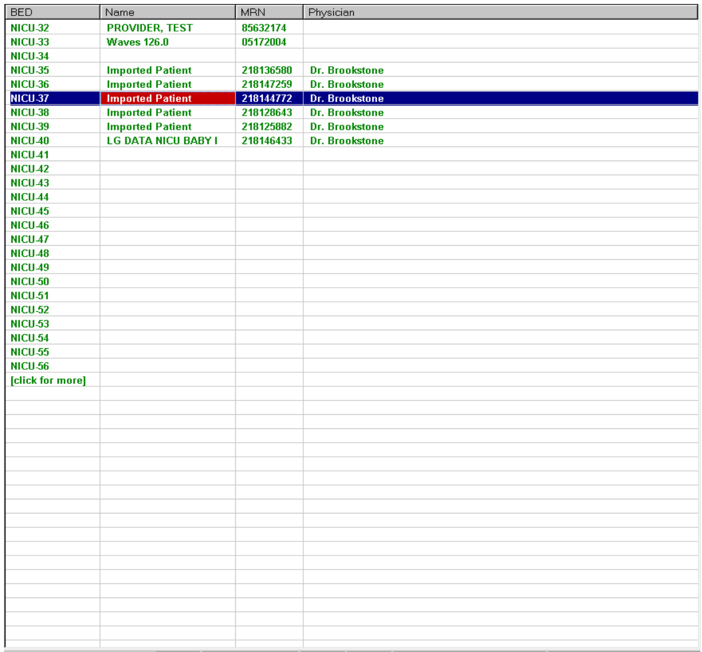
Adjust Column Size



## Application Display

The figure below shows the Application Display area in Patient Control, which shows the patients by bed number within the selected unit. Columns automatically resize to fit the longest line of data.

The bed names preceded by a "+" symbol designate that the patient has previous stays at the hospital. For additional information, refer to"Patients with Previous Stays" on page 38.




## Title Bar

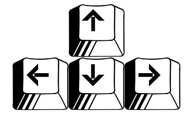
The Title Bar displays the title of the currently displayed application or application choice. For example, if you select the **Vitals** option from the **Flowsheets** application, the Title Bar displays **Vitals Flowsheet**.


## Menu Bar

The Menu Bar is a Windows-standard format. The menu names displayed on the Menu Bar and its drop-down menus vary depending on the system configuration, the unit selected, and the application being used.


### Using Keyboard Access

Menus can be navigated using the mouse to select any menu, or by pressing the **Alt** key or the **F10** key to select the **File** menu. Once the **File** menu is selected, you can use the mouse or the keyboard arrow keys, to navigate to other menus and menu items.



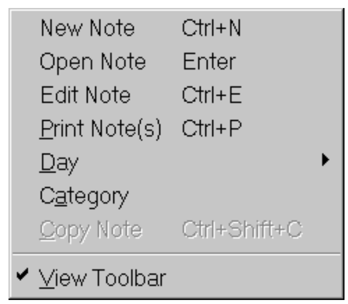
Arrow keys can also be used to access drop-down menus from the keyboard. When the **Alt** key is pressed, pressing the left- or right-arrow key moves the highlighted selection to the previous or next menu title, respectively. Press the **Enter** key or down-arrow key to display the drop-down menu associated with the highlighted menu title. If a drop-down menu is already displayed on the menu bar, then pressing left- or right-arrow key highlights the next drop-down menu in that direction.

In an open drop-down menu, pressing the up- and down-arrow keys moves to the next menu item in that direction and wraps the highlight around at the top or bottom.

Menus that contain an underlined character in their names, such as **Edit**, **View**, **Admin**, and others, can be accessed directly by pressing the **Alt** key and the underlined character key together, or by pressing the underlined character key after the **Alt** key is released. You can then use the mouse or the keyboard arrow keys to select a menu item or navigate to other menus and menu items.

To close a drop-down menu and deactivate the menu bar, press the **Alt** key. Pressing the **Esc** key also closes a drop-down menu. However, this leaves its menu title highlighted. Press **Esc** a second time to remove the highlight on the menu title, and deactivate the menu bar. Selecting a menu item within the menu also closes the menu.

### Using Shortcut Keys




Shortcut keys are assigned to some commands in drop-down menus. Pressing a shortcut key combination has the same effect as choosing the command from the drop-down menu. The command associated with the shortcut key combination is invoked immediately, and the drop-down menu closes.

Available shortcut keys are listed next to the associated command in the drop-down menu. For example, in the **NotesAction** drop-down menu, **New Note** is invoked by pressing and holding the **Ctrl** key while typing **N**. Similarly, the **Copy Note** function is invoked by holding down **Ctrl** and **Shift** and typing **C**.

The Essentris applications shown in the Menu Bar are described in separate sections in the manual and are listed in the Table of Contents.

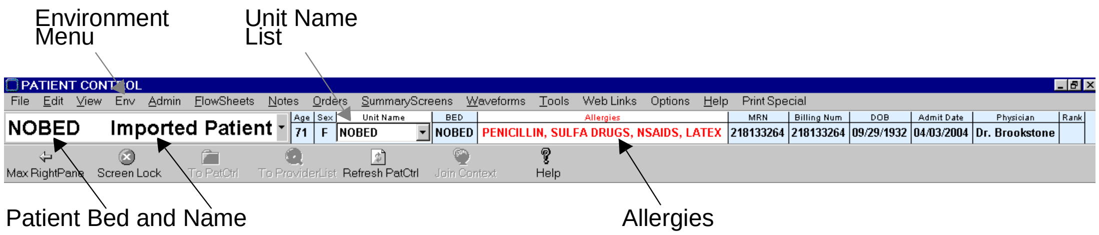
The following menus are described in "Utility Menus" on page 30:

- **File** menu
- **Edit** menu
- **View** menu
- **Help** menu
- **Print Special** menu

The **Env** (Environment) menu is described in "Env Menu" on page 32.

## Patient Header Bar

Patient information is displayed in all application screen headers. The features of the patient header are shown below.



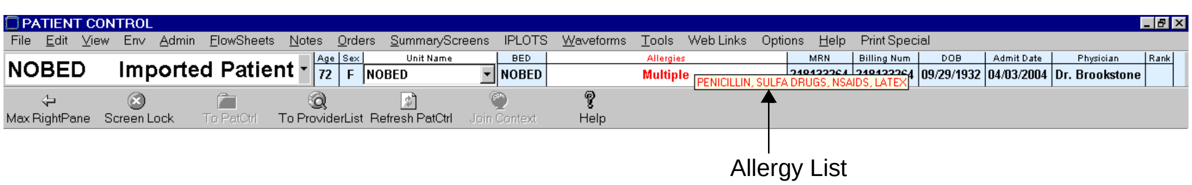

### Display Choices

The display can be configured for each unit to show selected patient data. Contact CliniComp Client Services for configuration changes. The default display includes all choices:

- Patient Name
- Patient Age
- Patient Gender
- Unit
- Bed
- Patient Allergies
- MRN
- Billing Number
- Date of Birth
- Admit Date
- Physician
- Military Rank (military facilities only)

### Allergies

If the Allergies box shows **Multiple**, this means that there are more allergy names to list than can fit in the box. Place the cursor over the word **Multiple** to see the complete list of allergies for the patient.



## Standard Toolbar

The standard toolbar is displayed when Essentris is invoked. The icons displayed vary depending on the application, although there are several icons that remain constant with most components. The following list describes the most common icons found on the standard toolbar that remain in each application.


### Max Right Pane

The **Max Right Pane** option extends the current application pane to fill the entire screen. Select the **Max Right Pane** icon to change to a single pane view. **Max Right Pane** can also be selected from the **View** menu.

### Three Panes

The **Three Panes** option restores the multiple-pane view. You can toggle between a single workspace or pane, and multiple panes at any time. **Three Panes** can also be selected from the **View** menu.

### Screen Lock

Use **Screen Lock** to prevent others from altering or accessing information when you are temporarily away from the workstation. Refer to "Screen Lock" on page 29 for a complete description.

### To PatCtrl

Use the **To PatCtrl** icon to return to the **Patient Control** screen. **To PatCtrl** can also be selected from the **View** menu.

### To ProviderList

A designated provider, such as a doctor, uses the **To ProviderList** icon to return to the provider patient list from another application. **To ProviderList** can also be selected from the **View** menu. The Provider List is described in "The Provider Patient List" on page 33.

### Refresh PatCtrl

Even though most user actions cause a refresh, use this icon as needed to refresh the current screen. **Refresh PatCtrl** updates the display with changes entered elsewhere in the facility. **Refresh PatCtrl** can also be selected from the **View** menu.

### Join Context

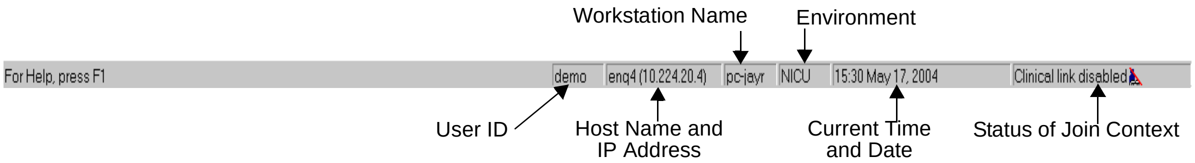
**Join Context** is a user authentication system that verifies valid users to all applications in a multi-system environment. Refer to "File Menu" on page 30 for a complete description.

### Help

Essentris includes online Help that can be accessed by using the **F1** key, the **Help** menu in the **Menu Bar**, or by selecting the question mark button on select windows and dialog boxes.

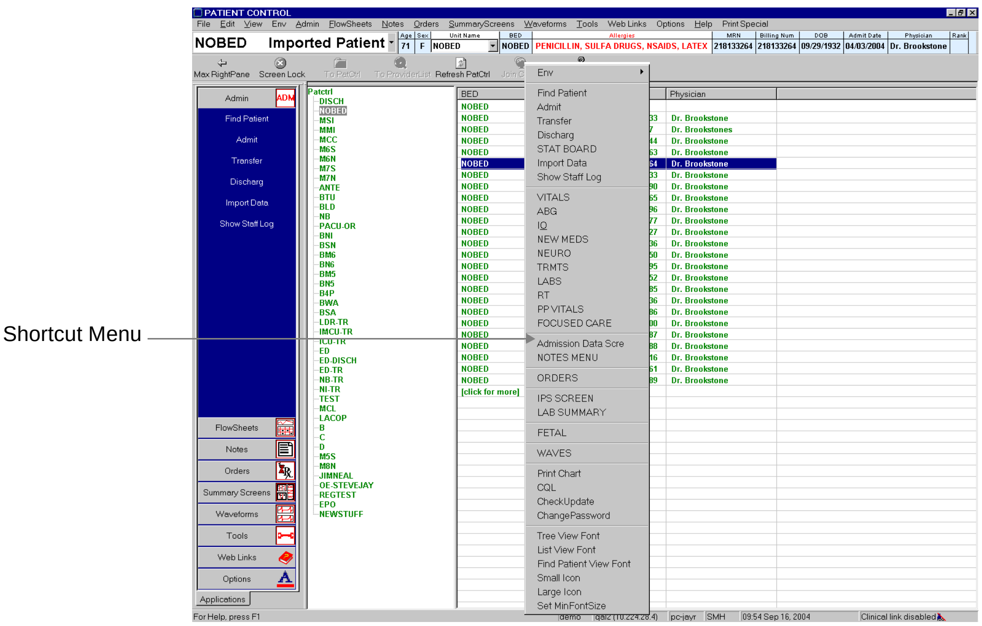
## Status Bar

The **Status Bar** is an area at the bottom of the Essentris window that displays information about the current state of the display in the Essentris window, or other contextual information. Its contents are read-only.



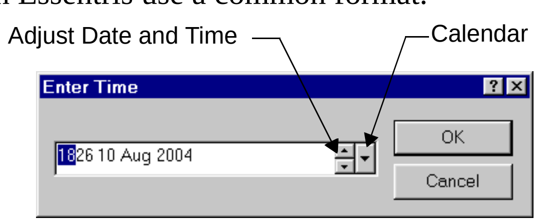

## Using the Shortcut Menu

Shortcut menus are displayed in different applications such as Flowsheets, Summary Screens, and others. Depending on the active application, a shortcut menu contains either menu options for the active application, or all menu options for all applications in the Menu Bar. If a shortcut menu is available, it is displayed by right-clicking the mouse in the application display area. The following shortcut menu is accessible from the Patient Control display.




## Date and Time Format

Date and Time fields in Essentris use a common format.



- The Tab key moves the focus to the next field. Shift+Tab moves the focus to the previous field.
- To select a date, click the calendar button to display the calendar.
- The keyboard left- and right-arrow keys are used to move the cursor within the Time and Date field.
- The Time and Date can be adjusted using the keyboard up- and down-arrow keys or by clicking the arrow buttons with the mouse.
- The + (plus) and - (minus) keyboard keys function the same as the up- and down-arrow keys.
- After the Date and Time are entered, press Tab to select the OK key. Press Enter to accept the displayed settings.
- Time windows can be configured to display only the time.
- Various other control buttons can be configured for different applications, such as Reset, Now, Admit Day, and Current Time.
- An upper time limit can be set to control time limits, such as Current Time.

## Using The Mouse in Essentris

Essentris uses the primary and secondary mouse buttons. The primary button is the left button and the secondary button is the right button. This applies to both the two-button and three-button mouse.

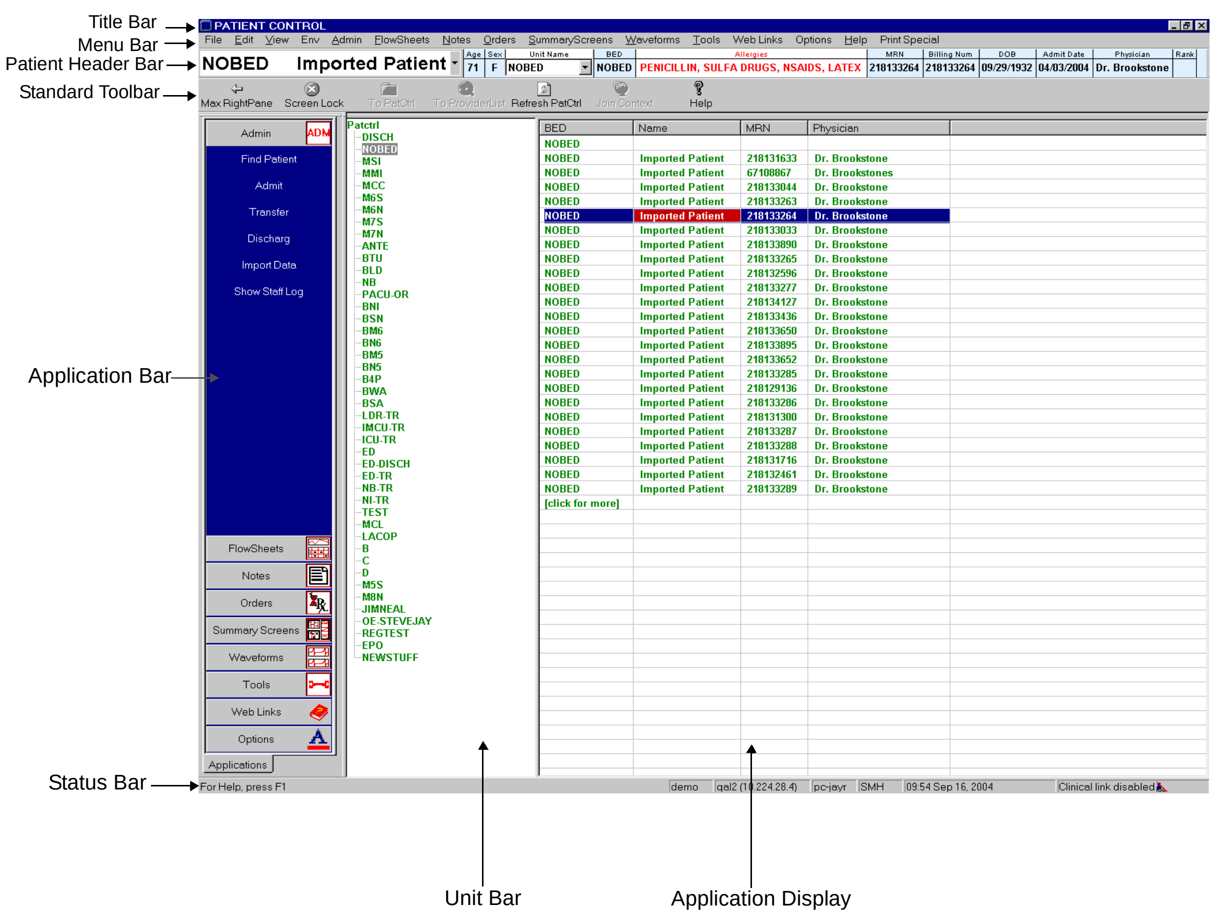
- Left button (primary)<br>Terminology: “click,” “left-click”<br>Operation: opens all menus except shortcut menus, make all selections including menu choices.
- Right button (secondary)<br>Terminology: “right-click”<br>Operation: displays shortcut menus. See "Using the Shortcut Menu" on page 25.

To access the drop-down menus on the Menu Bar using the mouse, point to the menu title and click. The menu title is highlighted and the associated drop-down menu appears. To use a menu option, move the pointer to the menu choice and click the mouse button.

# Patient Control

The Patient Control screen is the first screen displayed upon launching Essentris. From the Patient Control screen you can manage patients efficiently and access other Essentris components such as Flowsheets and Notes.

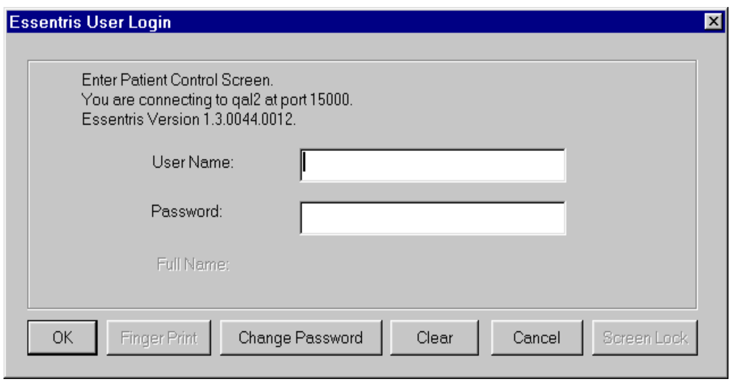
Multiple panes are displayed in the Patient Control interface to enable drag-and-drop functionality for various user actions.



## Password Access to Essentris

Use the following steps to enter the Patient Control screen.

| Step by Step | Additional Information |
|---|---|
| 1. In the **Essentris User Login** window, enter your User Name and Password. | |
| 2. Click the **OK** button to access Essentris. | The Essentris **Patient Control** screen appears. |
| Click the **Clear** button to clear the User Name and Password fields, or to retype the correct information. | The **Clear** button clears the fields in the user login window. You can also backspace to retype the correct information. |
| Click **Cancel** to exit the user login window. | The **Cancel** button aborts the login process into Essentris. |
| Use the **Change Password** button to change your password. | Refer to "Changing Your Password" on page 156. |



## Screen Lock

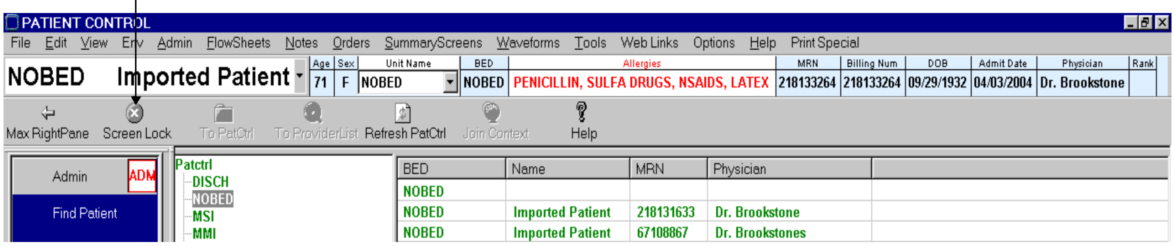
You can lock the screen at any time, freezing the application and prohibiting others from accessing or altering information.

### Locking the Screen

To Lock the Screen, perform the following steps:

| Step by Step | Additional Information |
|---|---|
| 1. Store all unsaved information before locking the screen. | |
| 2. Click the **Screen Lock** button from the Standard Toolbar. | The Patient Control screen turns black and is inaccessible until your password is entered. |

Screen Lock Button




### Unlocking the Screen

To Unlock the Screen, perform the following steps:

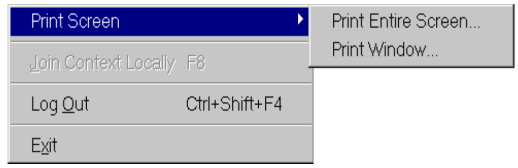
| Step by Step | Additional Information |
|---|---|
| 1. Click on the black screen. | The **Validation Dialog** window appears. |
| 2. Enter your **User Name** and **Password** in the **Validation Dialog** window. | The Patient Control screen reappears.<br>**Note:** If unstored data is present and you are not the user who locked the screen, The following message appears:<br>*Another user left changes on (application name). Login and discard them? Y/N* |

## Utility Menus

The following menus are included in the Menu Bar on most Essentris screens. They contain utility functions that support the patient applications, such as printing options, changing the look of the application screen, logging out, and exiting Essentris.

### File Menu

The **File** menu includes the following choices:




**Print Screen**
From **Print Screen**, choose **Print Entire Screen** to print the monitor's display. Choose **Print Window** to print the active window. Other print options are on the **Tools** menu and the **Print Special** menu.

**Join Context Locally F8**
**Join Context Locally** is a user authentication system that verifies valid users to all applications in a multi-system environment. After the initial login, users can move about the system without having to login to each password protected environment within the system.

If this option is active on your system, follow instructions from your System Administrator. This feature is also started using the **F8** key or the **Join Context** icon. The status of the feature is shown in the Status Bar at the bottom of the **Patient Control** screen and most other Essentris screens.

**Log Out Ctrl+Shift+F4**
Use **Log Out** to close your Essentris session, but leave Essentris active. The Essentris screen changes to a black screen with the CCI logo. To log in, press any key to display the **Essentris User Login** screen. Enter your username and password and press Enter. The Essentris **Patient Control** screen appears.

**Exit**
Use **Exit** to shut down Essentris on the desktop. Use the launcher to restart Essentris.

### Edit Menu

The **Edit** menu includes the following choices:


**Copy Right Pane Ctrl+C**
Use **Copy Right Pane** to copy and paste the display information to a separate document such as MS Word.

**Copy Right Pane (bmp)**
Use **Copy Right Pane (bmp)** to copy and paste the display information, in bmp graphic format, to a separate document such as MS Word.

**Paste Ctrl+V**
Use **Paste** to insert display information into a separate document such as MS Word.

## View Menu


Use the **View** menu to change the user's view of data in the window. The **View** menu includes commands that affect the view and not the data itself. Check marks in the menu identify active choices.

### Max Right Pane

The **Max Right Pane** option extends the current application pane to fill the entire screen. Select **Max Right Pane** to change to a single pane view. **Max Right Pane** toggles with **Three Panes**. **Max Right Pane** can also be selected from the toolbar.

### Three Panes

The **Three Panes** option restores the multiple-pane view. You can toggle between a single workspace or pane, and multiple panes at any time. **Three Panes** toggles with **Max Right Pane**. **Three Panes** can also be selected from the toolbar.

### To PatCtrl

Use **To PatCtrl** to return to the **Patient Control** screen. The **To PatCtrl** icon can also be selected from the toolbar.

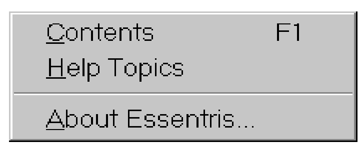
### To ProviderList

A designated provider, such as a doctor, uses the **To ProviderList** menu item to return to the provider patient list from another application. The **To ProviderList** icon can also be selected from the toolbar. The Provider List is described on page 33.

### Refresh PatCtrl

Even though most user actions cause a refresh, use this menu item as needed to refresh the current screen. **Refresh PatCtrl** can also be selected from the toolbar. The Refresh function updates all active Essentris displays.

## Help Menu




Use the **Help** menu to view the Essentris online Help files, or the About Essentris information.

### Contents F1

Select **Contents** or press **F1** to open the **HTML Help** window. The left pane lists the table of contents for the help files. The right pane shows the title page of the help file.

### Help Topics

Select **Help Topics** to open the **HTML Help** window. The left pane shows the index for the help files. The right pane shows the title page of the help file.

The **HTML Help** window has tabs to select **Contents**, **Index**, or **Search**.

### About Essentris

Select **About Essentris** to view host names; system file names; network connection data; Essentris version, build number, and build date; and load balancing data. Refer to "Essentris Version Number" on page xiv for additonal details.

## Print Special Menu

The menu is used only in the **Patient Control** window to print the **Application Display**. It contains standard Microsoft Windows print features.


### Print Ctrl+P

Select **Print,** or hold down the **Ctrl** key and type **P,** to open the **Print** window. Click the **OK** button to print the **Application Display**. Use the **Properties** button to make necessary changes in the print options.

### Print Preview

Use **Print Preview** to display the **Application Display** as it appears on a printed document.

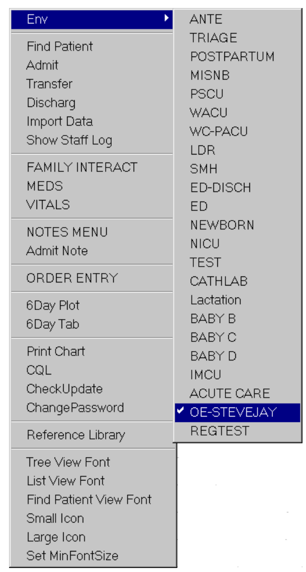
### Print Setup

Use **Print Setup** to open the **Print Setup** window and change print options before printing the **Application Display**.

## Env Menu

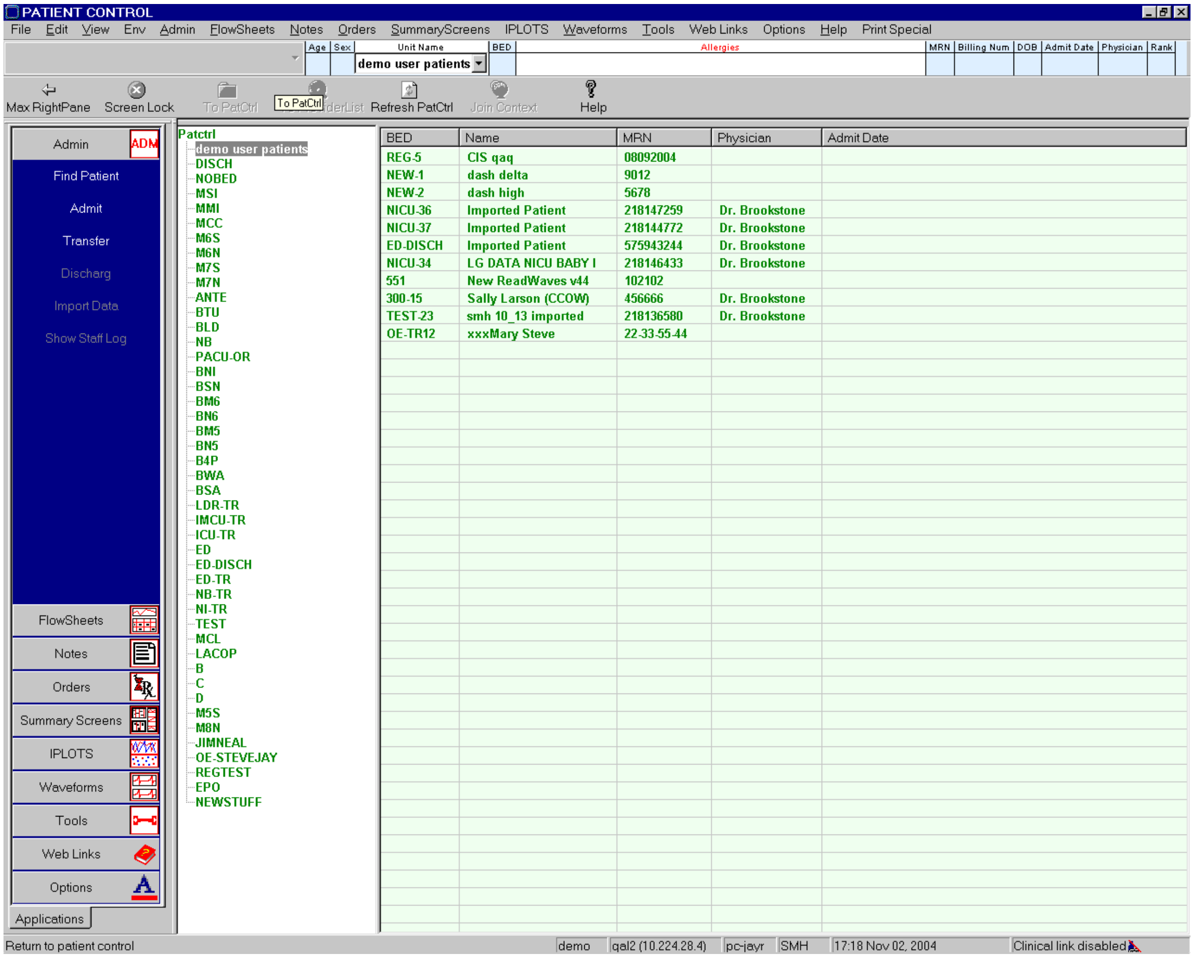
Use the **Env** menu to select the type of environment for a Unit. Each environment is configured for a specific type of Unit, and more than one Unit can use the same environment. The **Env** menu is selected from the Menu Bar or the Shortcut Menu.

Shortcut Menu



# The Provider Patient List

The Provider List is a virtual unit that contains a list of patients for a doctor or other service provider. The unit name is labelled by default with the provider's log-on ID. It is displayed at the top of the Unit tree when the provider logs on to Essentris. Contact CliniComp Client Services to rename the Unit.




The Provider List includes the following features:

- The virtual unit can be viewed anywhere in the hospital.
- Each patient record in the Provider List retains the configurations from the patient's unit.
- The provider adds or removes patients from his or her own Provider List.
- After a patient is added, the Provider List is displayed.
- Multiple patients can be added at one time. If any of the patients cannot be added, such as an archived patient record, the following error message is displayed:

  *x patient(s) cannot be added to provider list*
  (*x* is the number of patient records that could *not* be added.)
- Patients can be added using the **Find Patient** dialog box.

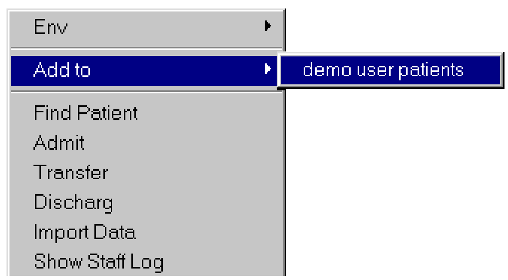
- The attending physician's patients are automatically added to the Provider List.
- The Provider List displays only active patients. This includes Discharged patients until they are archived.
- A new icon in the application screens, labelled **ToProviderList**, returns to the Provider List instead of the Patient Control screen.
- This feature uses an Include file to display patients who can be included in the Provider List. There is also an Exclude file to list patients for exclusion from the Provider List. See **Using the Include and Exclude Files** below.
- Multiple stays are also listed with the current stay.
- When the Provider List is populated, it is the default unit. If the Provider List is empty, the default unit for the terminal is used on Essentris startup. If the logged-in user changes, and the new user does *not* have a Provider List, the Nobed unit is displayed and *no* patient is selected.
- A password is required to add a new patient to the Provider List.
- A Provider List is created automatically for a new provider.

Contact CliniComp Client Services to configure this feature.

## Using the Include and Exclude Files

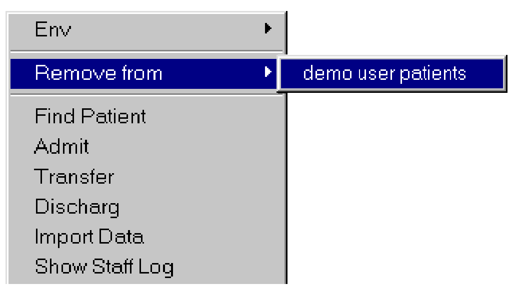
### Adding Patients

All patients are assigned to the Include file for the provider that is specified in the admittance process. These patients are automatically displayed in the Provider List. Patients assigned to other providers can be added to the Include file by opening the patient's Unit, selecting the patient, and right-mouse click to open the shortcut menu. Select **Add to** → *provider-id* **patients**. The patient is added to the provider's Provider List and the Include file.



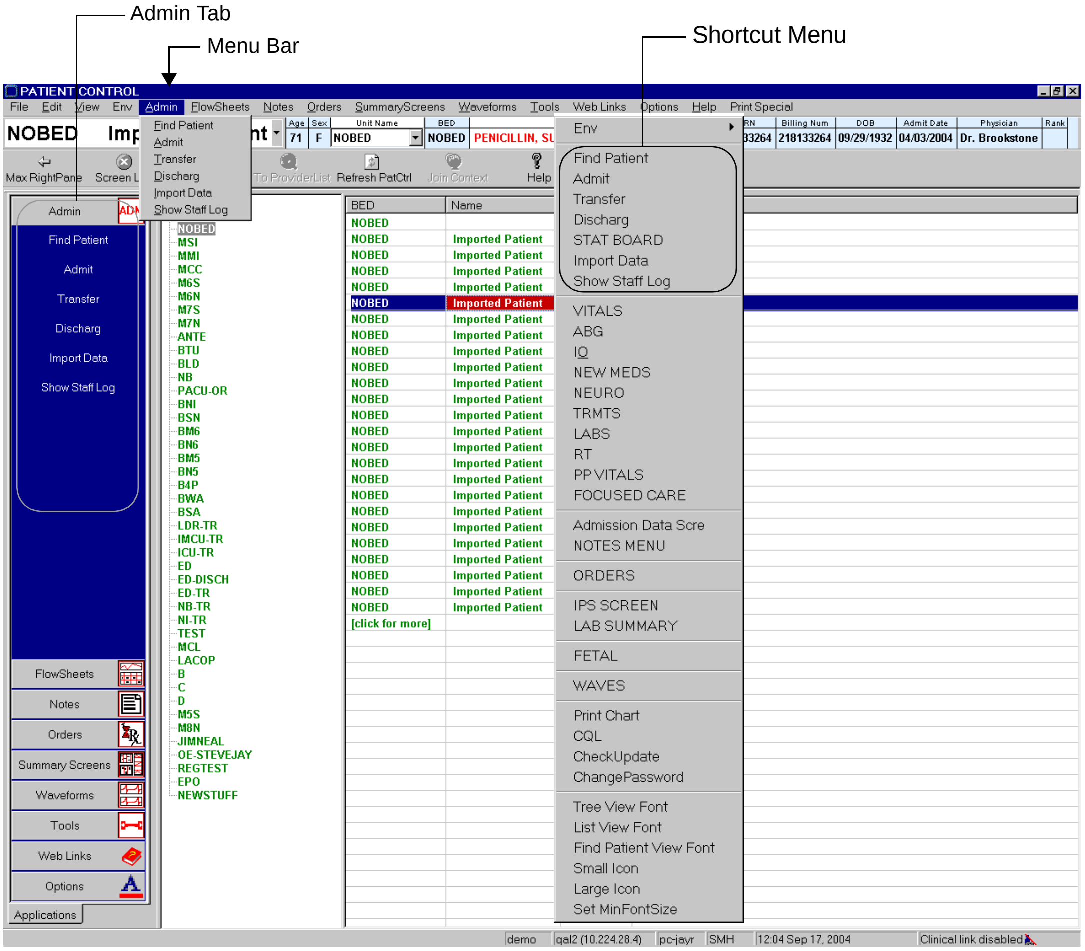

### Removing Patients

To remove a patient from the patient list, select the patient in the Provider List and right-mouse click to open the shortcut menu. Select **Remove from** → *provider-id* **patients**. The patient is removed from the Provider List and the Include file. The patient is added to the Exclude file.

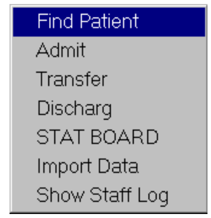


# Admin Menu

The **Admin** menu contains several patient administrative functions. These functions are accessed from the Applications Bar, the Menu Bar, or the Shortcut Menu.

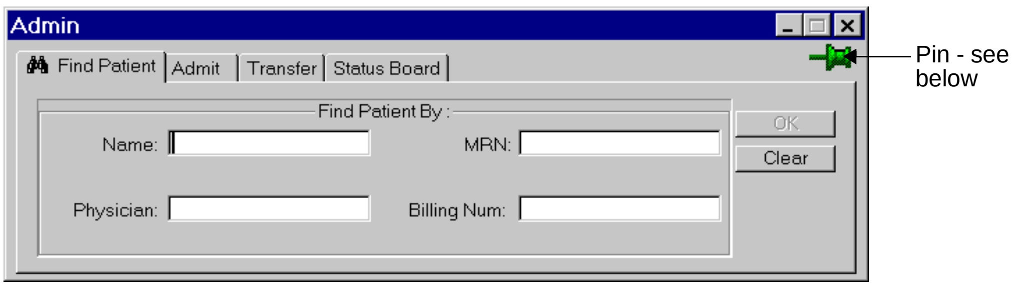


## Finding a Patient




Use **Find Patient** to locate patients based on the patient's name, the physician's name, the patient's Medical Record Number (MRN), or the billing number associated with the patient. To find a patient, perform the following steps:

| Step by Step | Additional Information |
|---|---|
| 1. Select the **Find Patient** option from any of the **Admin** menus. | The **Admin** pop-up window opens with the **Find Patient** tab selected. |




| | |
|---|---|
| 2. Enter the necessary information in the **Admin** pop-up window text fields. | The search feature in Find Patient is not case-sensitive. It retrieves all names that include the entry in the **Name** field. |
| 3. Click the **OK** button in the **Admin** window. | The patient information appears on the Application Display. |
| 4. Click the **Clear** button to clear the text fields. | Use the **Clear** button to clear the text fields for a new search. |

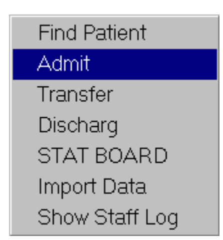
When the patient is found, you can then display the patient's unit and environment by double-clicking the patient in the Application Display.

**Pin** - Click the Pin to keep the **Admin** pop-up window on top of all other application windows. Click the Pin again to remove the on-top mode.

**Note:** When using Find Patient to transfer a patient by right clicking, and the patient is an archived record, the following error message is displayed:

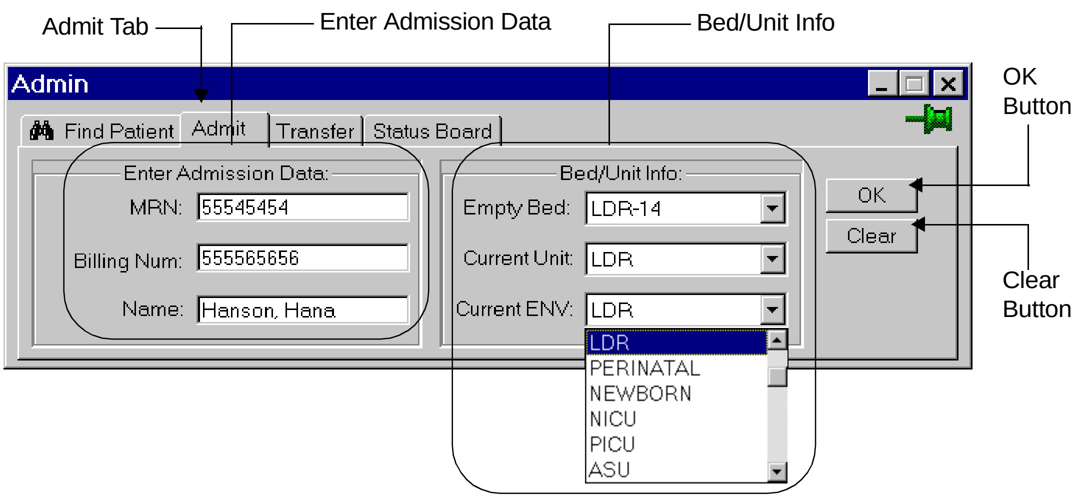
*Warning: The selected patient [patient-name] is not allowed to transfer*

## Admitting a Patient

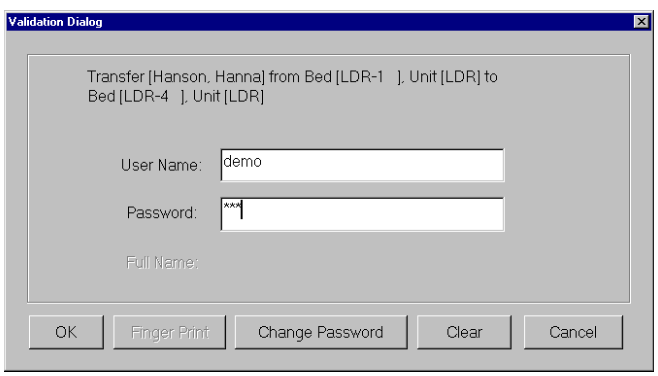


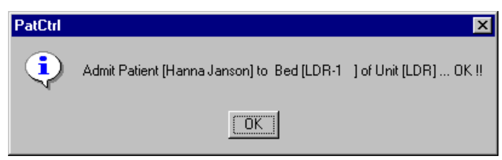

New patients can be admitted in Essentris by using the **Admit** option from any of the **Admin** menus. To Admit a Patient, perform the following steps:

| Step by Step | Additional Information |
|---|---|
| 1. Enter the required information in the **Bed/Unit Info** fields.<br>2. Enter the required information in the **Enter Admission Data** fields. | The choicelist for the **Empty Bed** text field is automatically populated by the selected Unit and Environment. To change the **Bed/Unit Info**, use the arrows on the choicelist. It is not possible to admit a patient to an occupied bed. |




| Step by Step | Additional Information |
|---|---|
| 3. Click the **OK** button on the **Admin** window. | If you have entered valid information in the admission fields, the **Validation Dialog** window appears. |
| 4. Enter your **User Name** and **Password** and click **OK**. | The patient admission data appears in the selected unit. |
| 5. Click **OK** to complete the admission. | The **PatCtrl** acknowledgment box appears. |



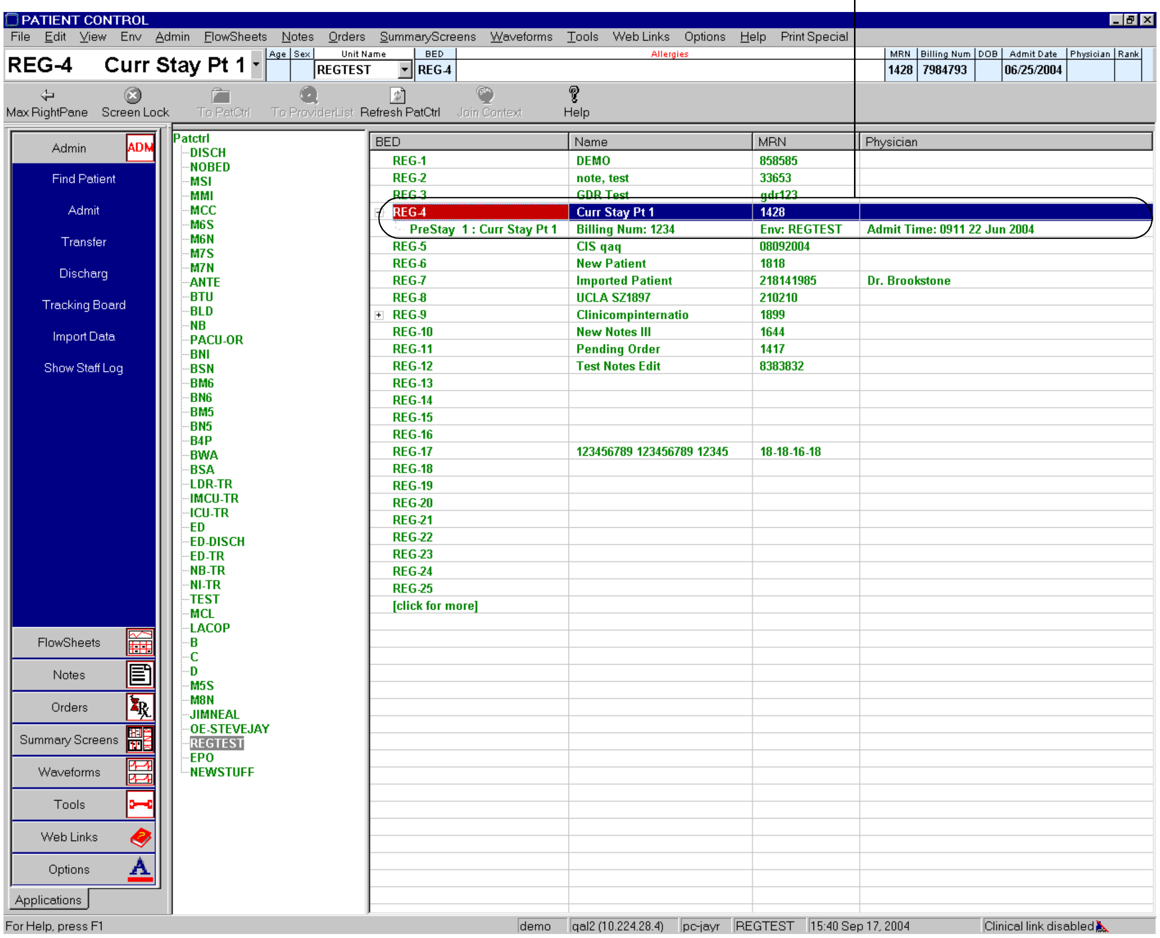

**Note:** When a patient is admitted manually, the patient Medical Record Number (MRN) and Billing Number have a maximum of 16 characters, and the patient name has a maximum of 26 characters. These requirements do not change patient information in the ADT record.

## Patients with Previous Stays

A Previous-Stay patient is a current patient with a history of previous admissions to the hospital or clinical unit. Previous stays can be viewed by clicking on the '+' icon next to the patient's name. The current patient information is always displayed. Previous stay information might be read-only, depending on the clinical environment of the patient. To view patients with previous stays, perform the following steps:

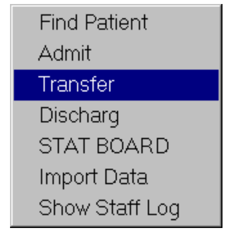
| Step by Step | Additional Information |
|---|---|
| 1. Click on the "+" sign next to a patient's name in the **Application Display** to view the previous stays for the patient. | The patient's previous stays appear in the **Application Display**. The "+" sign changes to a "-" sign. |
| 2. Click on the patient's "-" sign in the **Application Display** to close the previous stays. | |

Patient with Previous Stays

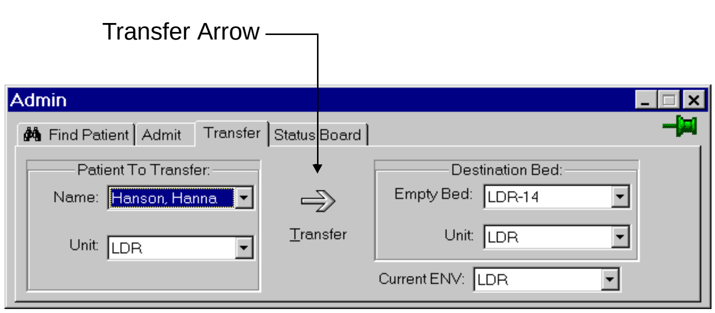


## Transferring a Patient

In Essentris, it is possible to transfer patients from one bed to another within the same unit or between units. To transfer a patient, select **Transfer** from any of the **Admin** menus and perform the following steps:




| Step by Step | Additional Information |
|---|---|
| 1. In the **Application Display,** click on the patient to be moved. | |
| 2. Select the **Transfer** option from any of the **Admin** menus. | The **Admin** window appears with the **Transfer** tab selected. Complete the fields as described in Steps 3 and 4. |
| 3. Enter the patient information in the **Transfer** window text fields. | The choicelist for the **Patient to Transfer** and **Destination Bed** text fields are populated by the selected Unit and Environment. To change the **Name** or **Unit** fields under **Patient to Transfer** or **Destination Bed**, use the arrow button on the choicelists.<br><br>You cannot transfer a patient to an occupied bed. You can transfer a patient to an inaccessible unit. Inaccessible units are included on the Unit choicelist. |
| 4. Click the **Transfer Arrow** to transfer the patient to the selected unit and bed or environment. | The **Validation Dialog** window appears prompting you to enter your **User Name** and **Password**. |



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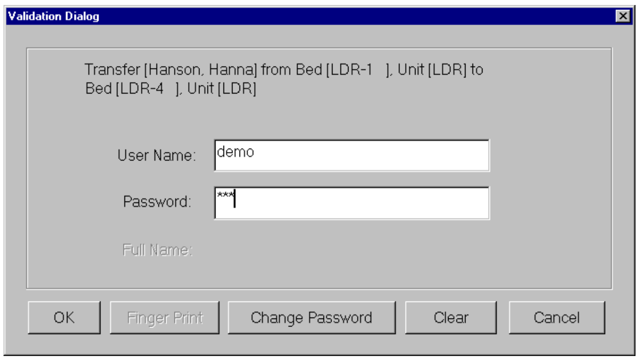
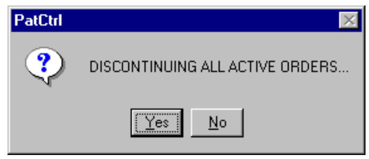
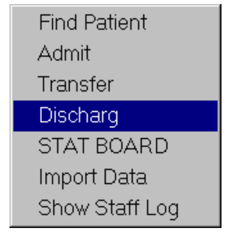
| Step by Step | Additional Information |
| --- | --- |
| 5. Enter your **User Name** and **Password** in the **Validation Dialog** window. | The patient appears in the specified unit. |
| 6. The **PatCtrl** dialog box appears (this is an optional configuration for each Unit). | Select **Yes** to discontinue all active orders. Select **No** to proceed without discontinuing all active orders.<br>The patient is tranferred. |



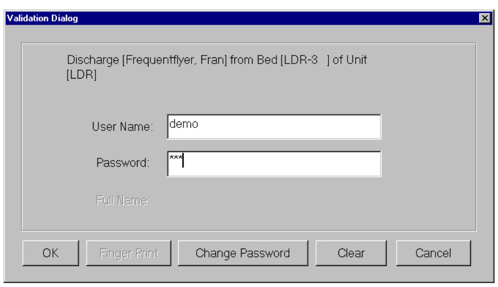



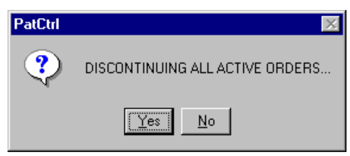
## Discharging a Patient

To discharge a patient, perform the following steps:

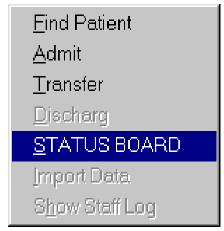



| Step by Step | Additional Information |
| --- | --- |
| 1. Click on the patient to drag the patient from the **Application Display** to the **Discharge** option in the **Admin** tab.<br><br>Optionally, select the **Discharge** option from any of the **Admin** menus. | The **Validation Dialog** window appears prompting you to enter your **User Name** and **Password**. |
| 2. A **PatCtrl** dialog box appears (this is an optional configuration for each Unit). | Select **Yes** to discontinue all active orders. Select **No** to proceed without discontinuing all active orders.<br><br>The patient is discharged. |



## Using the Status Board

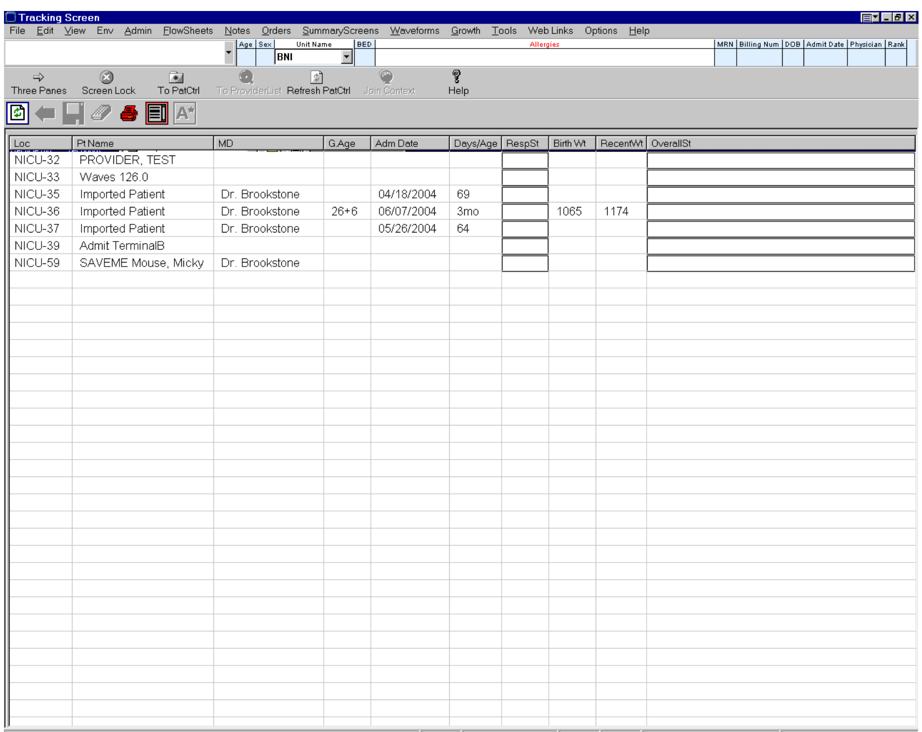



The **Status Board** application retrieves patient information and displays it in a summary chart. The columns of the chart can be configured to display various types of patient information. Also, the columns can be configured to sort the display by any column or columns and in ascending or descending order. Also, color-coded alert flags can be set for any patient. Refer to "Using Color Coded Flags" on page 47. The **Status Board** can determine the physical location and status of a patient from any Essentris PC within the health care facility. Patient information is dynamically updated.

Some columns of the **Status Board** are editable but most, typically, are not. Columns can contain text or numerical information. Some columns display calculated items.

The screen title, **Status Board**, can be configured for each Unit. The screen title is displayed in the menus. To access a Unit **Status Board**, perform the following steps:

| Step by Step | Additional Information |
|---|---|
| 1. In the **Patient Control** window, display the Unit to be shown in the **Status Board**. | |
| 2. Select the **Status Board** option from the **Admin** tab in the Application Bar, the Menu Bar, or right mouse click on the application display and select the **Status Board** option from the Shortcut Menu. | The **Status Board** window appears for the Unit displayed in the **Patient Control** window. |



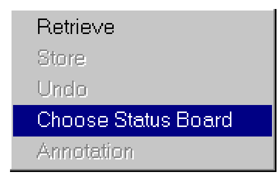
### Filtering Information for the Patient Status Board

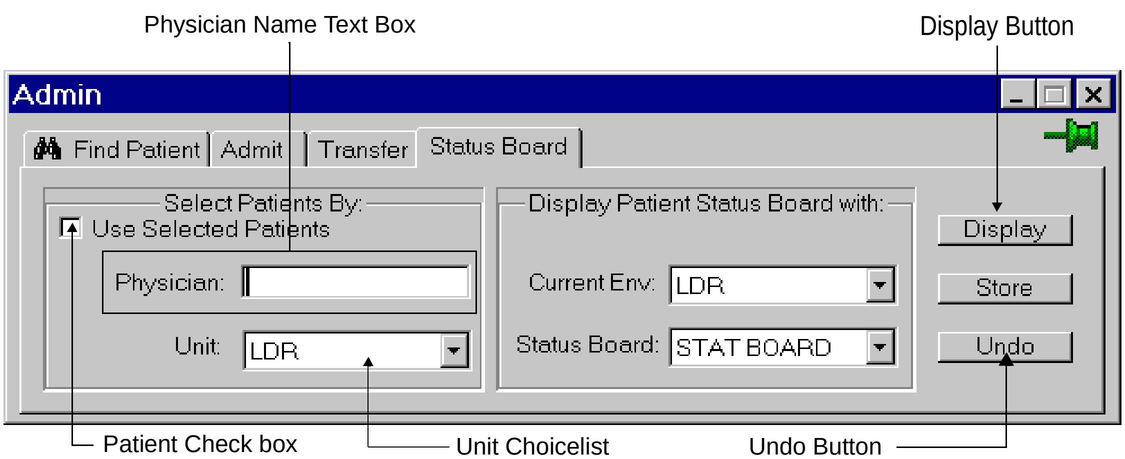
The **Status Board** application can retrieve patient data according to certain user-defined criteria, or filters. The filtering options narrow the search for information on a patient or a group of patients. You can filter patient information by Physician Name, Unit, or by a selected group of patients.

#### *Selecting Patients by Physician Name*

The system can retrieve all patients under the care of a specific physician and display the results in the **Status Board**. To select Patients by Physician Name, perform the following steps:

| Step by Step | Additional Information |
| --- | --- |
| 1. Place the cursor in the display area of the **Status Board** and press the right mouse button. | A pop-up menu appears. |
| 2. Select **Choose Status Board**. | The **Admin** window appears with the **Status Board** tab selected. |
| 3. Enter the physician’s name in the **Physician:** text box. | The filter selects all physician’s names that include the name entered in the **Physician** name box. |
| 4. Click the **Display** button. | Information for the patients under the care of the specified physician is displayed in the Status Board. |
| Options: | |
| Use the **Undo** button to clear the text fields. | You can choose to enter new information in the text fields. |
| Click the **Pin** icon to keep the **Admin** window on top of the other windows. | |



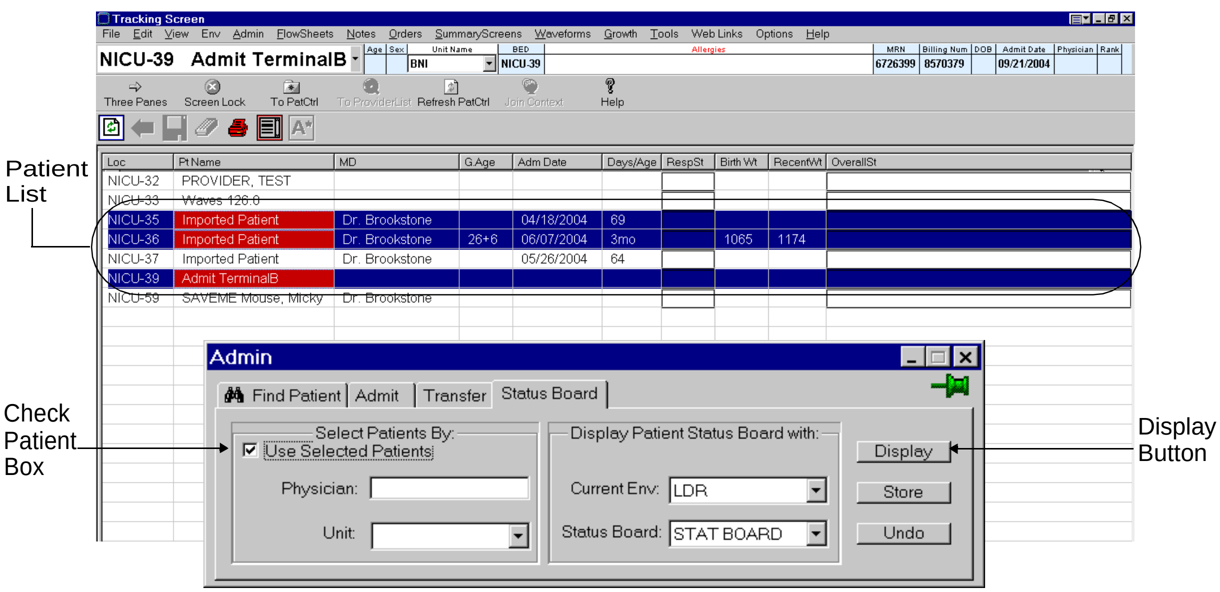
### *Selecting Patients by Unit*

The system can retrieve all patients in a specified unit and display the results in the **Status Board**. The procedure for selecting patients by Unit is identical to selecting patients by Physician Name, except in Step 3: Choose the Unit using the Unit Choicelist in the **Admin** window.

### *Selecting Patients from a Patient List*

To select patients from a patient list, perform the following steps:

| Step by Step | Additional Information |
|---|---|
| 1. Select patients from a displayed patient list. | The group of patients can be selected from any displayed patient list, including a **Status Board** after filtering by Physician name or Unit.<br><br>To select more than one patient, hold down the **Ctrl** key while using the mouse to select the patients. |
| 2. Hold down the **Ctrl** key and right-click the mouse. | The pop-up menu appears. |
| 3. Select **Choose Status Board**. | The **Admin** window appears. |
| 4. Check the **Use Selected Patients** box in the **Admin** window. | |
| 5. Click the **Display** button. | The **Status Board** displays the selected list of patients. |



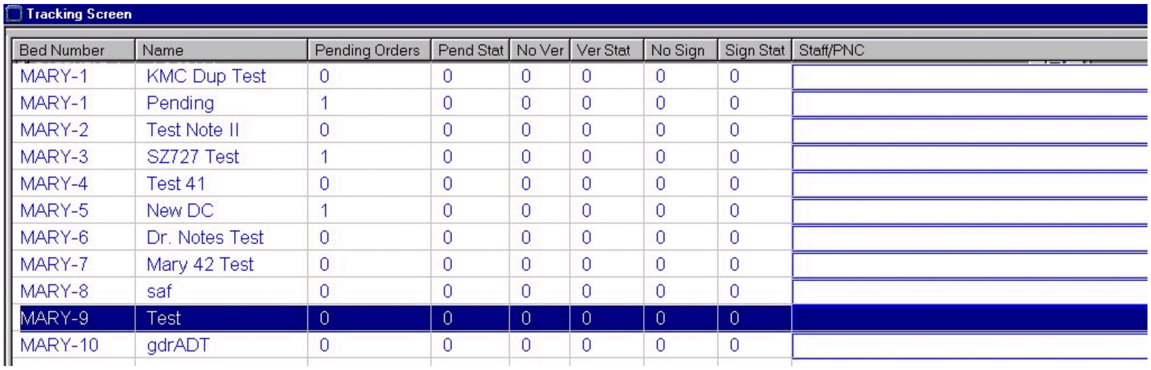
### Sorting Patient Information by Field

After creating a patient list by using one of the previously described filtering methods, you can sort the patient data by clicking on the column heading of the data to be sorted. For example, by clicking on the Age column heading, age information for a group of patients can be displayed in ascending or descending order.

Columns containing text sort alphabetically. Columns containing numerical data sort numerically. Columns containing date and time information sort chronologically.

### Displaying Order Counts

The Status Board can be configured to display the number of orders and order status in a Unit by patient.




| Bed Number | Name | Pending Orders | Pend Stat | No Ver | Ver Stat | No Sign | Sign Stat | Staff/PNC |
|---|---|---|---|---|---|---|---|---|
| MARY-1 | KMC Dup Test | 0 | 0 | 0 | 0 | 0 | 0 | |
| MARY-1 | Pending | 1 | 0 | 0 | 0 | 0 | 0 | |
| MARY-2 | Test Note II | 0 | 0 | 0 | 0 | 0 | 0 | |
| MARY-3 | SZ727 Test | 1 | 0 | 0 | 0 | 0 | 0 | |
| MARY-4 | Test 41 | 0 | 0 | 0 | 0 | 0 | 0 | |
| MARY-5 | New DC | 1 | 0 | 0 | 0 | 0 | 0 | |
| MARY-6 | Dr. Notes Test | 0 | 0 | 0 | 0 | 0 | 0 | |
| MARY-7 | Mary 42 Test | 0 | 0 | 0 | 0 | 0 | 0 | |
| MARY-8 | saf | 0 | 0 | 0 | 0 | 0 | 0 | |
| MARY-9 | Test | 0 | 0 | 0 | 0 | 0 | 0 | |
| MARY-10 | gdrADT | 0 | 0 | 0 | 0 | 0 | 0 | |

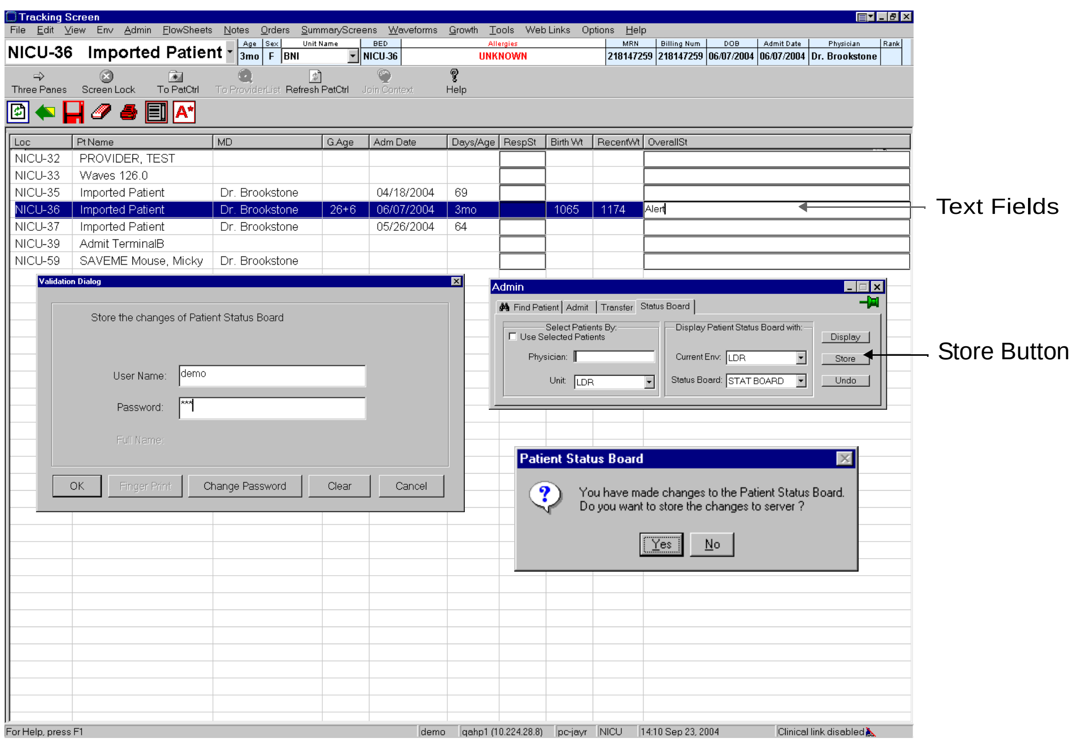
The following list defines the status columns.

- **Pend Stat -** orders without Sign, without Verify, and with a Stat frequency
- **No Ver** - orders without Verify
- **Ver Stat** - orders without Verify with a Stat frequency
- **No Sign** - orders without Sign
- **Sign Stat** - orders without Sign with a Stat frequency

## Entering Information in the Patient Status Board

Various types of patient information can be configured to be displayed in the **Status Board** screen. Each screen column can be set up to be editable or read-only. Editable columns can be configured further to accept only certain types of input. For example, a column displaying the patient's heart rate can be set up to accept only numerical values. Also, the **Status Board** columns can be resized by selecting and dragging one side of a column header to a new size. To enter information in the **Status Board** screen, perform the following steps:

| Step by Step | Additional Information |
|---|---|
| 1. Select a cell in the **Status Board** to enter information by clicking it and pressing **Enter**, or by double-clicking it. | The background color of the cell changes when you enter an editable field, and the text cursor is active in the cell. |
| 2. Edit the information in the selected field. | You can enter information into more than one text field before you Store. |
| 3. Open the **Admin** window and click the **Store** button. | The **Patient Status Board** dialog box appears. |
| 4. Click **Yes** in the **Patient Status Board** dialog box. | The **Validation Dialog** window appears. |
| 5. Enter your **User Name** and **Password** in the **Validation Dialog** window. | Information entered into the **Status Board** is updated on all terminals. |



## Patient Status Board Automatic Refresh

The server periodically refreshes the information in the Patient Status Board to ensure that the most current data is displayed.

## Using Color Coded Flags

Various data-cell types can be configured to use background color coding to display the status of selected patient data. These data cells display the specified color only when the data in the cell is within the specified range. The data-cell types are Elapsed Time, Numeric Range, Text Matching, and Time Range.

### *Elapsed Time*

The Elapsed Time data cell displays hours of elapsed time. Up to six hour-ranges can be color coded for an Elapsed Time data cell. For example:

| Beginning and Ending Elapsed Time | Background Color |
|---|---|
| 2 to 3 | Yellow |
| 3 to 4 | Orange |
| 4 and greater | Red |

### *Numeric Range*

Any numeric field can be configured as a Numeric Range field to display color-coded flags.
**Note:** Elapsed Time data cells cannot be used as Numeric Range fields.

Up to six ranges can be color coded for a Numeric Range field. Example ranges:

- When the data in the field named *Priority* is in the range of **1** to **1**, the background color is red.
- When the data in the field named *Systolic Blood Pressure* is in the range of **0** to **80**, the background color is orange.
- When the data in the field named *Systolic Blood Pressure* is in the range of **150** or greater, the background color is red.

### *Text Matching*

Any text field can be configured as a Text Matching field to display color-coded flags by matching a text pattern.
**Note:** Elapsed Time data cells cannot be used as Text Matching fields.

Text matching does not require an upper- or lower-case character match. Therefore, “A” and “a” are a match. A pattern can be an exact match of the entire text or a starts-with match of the first character or characters of the text. Up to six patterns can be color coded for a Text Matching field. Example patterns:

- When the data in the *NurseOrder* field contains the exact match **Orders**, the background color is red.

- When the data in the *NurseOrder* field contains the starts-with character **P**, the background color is yellow.
- When the data in the *NurseOrder* field contains the starts-with characters **compl**, the background color is green.

***Time Range***

A Time Range field can be configured for any database-item text or numeric field.
**Note:** This applies only to data stored in the patient record and excludes computed data such as elapsed time or formulas.

The background color is determined by the specified range of time. For example:

- If the *NurseOrder* field has not been modified in the patient record for more than **1** hour and **12** minutes, the background color is red.

# Import Data

Data can be imported from one patient record to another in Essentris. The data available for importation is configured by environment. The imported data can be a subset of the available data. Use the Import Data feature for tasks such as to transfer information from mothers to babies, and from previous stays to the current stay.

Note

*Your user ID must have Import permission to use the Import Data feature.*

## Importing Patient Data

Use the following steps to import data from one patient to another:

| Step by Step | Additional Information |
|---|---|
| 1. Select the patient that is to receive the imported data. | |
| 2. Select **Import Data** from the Application Bar, the Admin drop-down menu, or the shortcut menu. | The **Import Data** window appears. The selected receiving patient is shown in the bottom half of the window. |
| 3. In the **Import Data** window, select the unit of the source patient from the **From Unit** choice list | Patients in the selected unit are shown in the display area below the unit choice list. |

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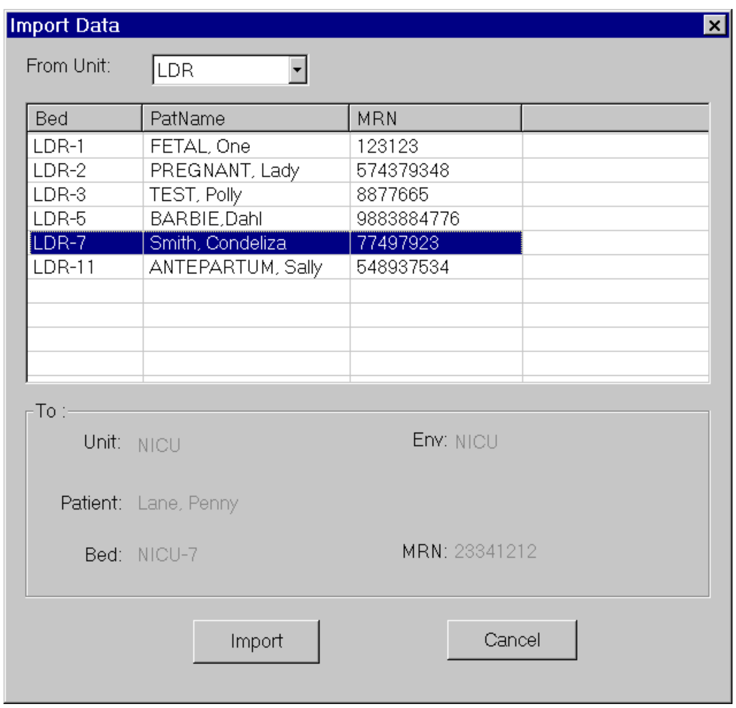
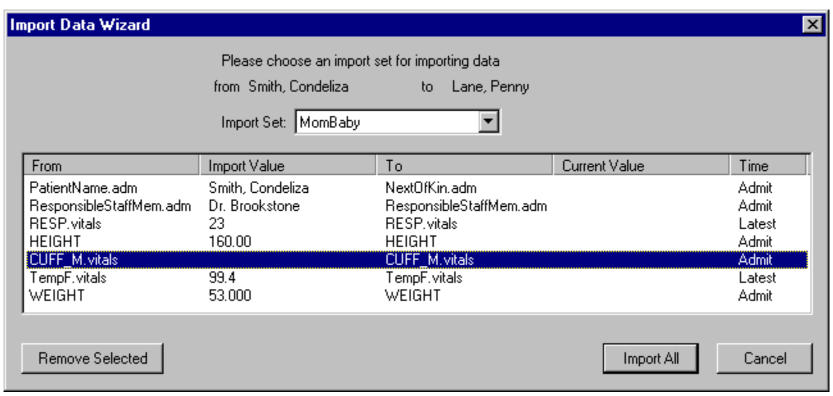
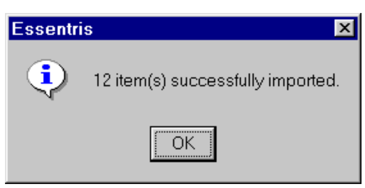
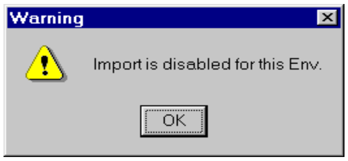


| | Step by Step | Additional Information |
|---|---|---|
| 4. | Select the source patient name and click the **Import** button. | The **Validation Dialog** box appears. |
| 5. | Enter your User Name and Password and click **OK**. | The **Import Data Wizard** window appears. |
| 6. | From the **Import Data Wizard** window, select an **Import Set** from the choicelist. | The **Import Set** contains a pre-configured set of database items to be copied to the destination patient's records, and the database items that receive the pasted information. Included is a time stamp: either Admit time or Latest update. Information stored in the destination patient record prior to the import is overwritten. |
| 7. | Use the **Remove Selected** button to choose which items *not* to import. | Hold down the **Ctrl** key to select multiple items, or the **Shift** key to select a series of items. |
| 8. | When the correct items are displayed, click the **Import All** button. | The items are copied from the source patient record to the destination patient record. The **Essentris** pop-up message appears. |
| 9. | Click the **OK** button on the **Esentris** pop-up message. | The **OK** button acknowledges the successful import operation. |



There are two configuration errors that can occur if the **Import Data** configuration file does *not* support the designated operations:




The unit in which the destination patient record resides is *not* configured to receive imported data.


The unit in which the destination patient record resides is *not* configured to receive data from the unit in which the source patient record resides.

To avoided these errors where a unit has Import Data disabled, change the *environment* to one that has Import Data enabled. The receiving unit must still be displayed in the Patient Control screen.

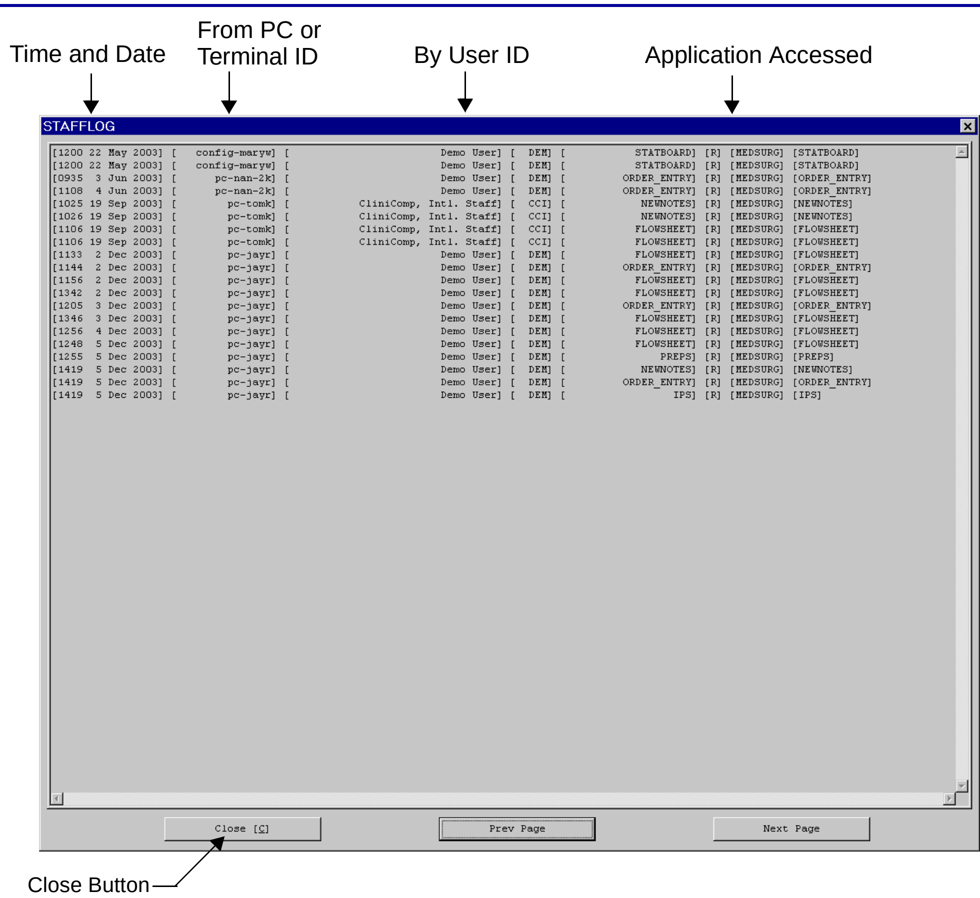
## Show Staff Log

Use the Staff Log to view Essentris activity for a selected patient.

> **Note** *The Staff Log is accessible only to users with Audit-trail permission.*

Use the following steps to display the Staff Log:

| Step by Step | Additional Information |
|---|---|
| 1. Select a patient. | |
| 2. Select **Admin** from the Menu Bar or the Application Bar and click on the **Show Staff Log** option, or select the **Show Staff Log** option from the Shortcut Menu. | The **Validation Dialog** window appears. |
| 3. Enter your **User Name** and **Password** and click **OK**. | The **StaffLog** window appears.<br>**Note:** To close the Staff Log window, click the **Close (C)** button at the bottom of the window. |



# Flowsheet Basics

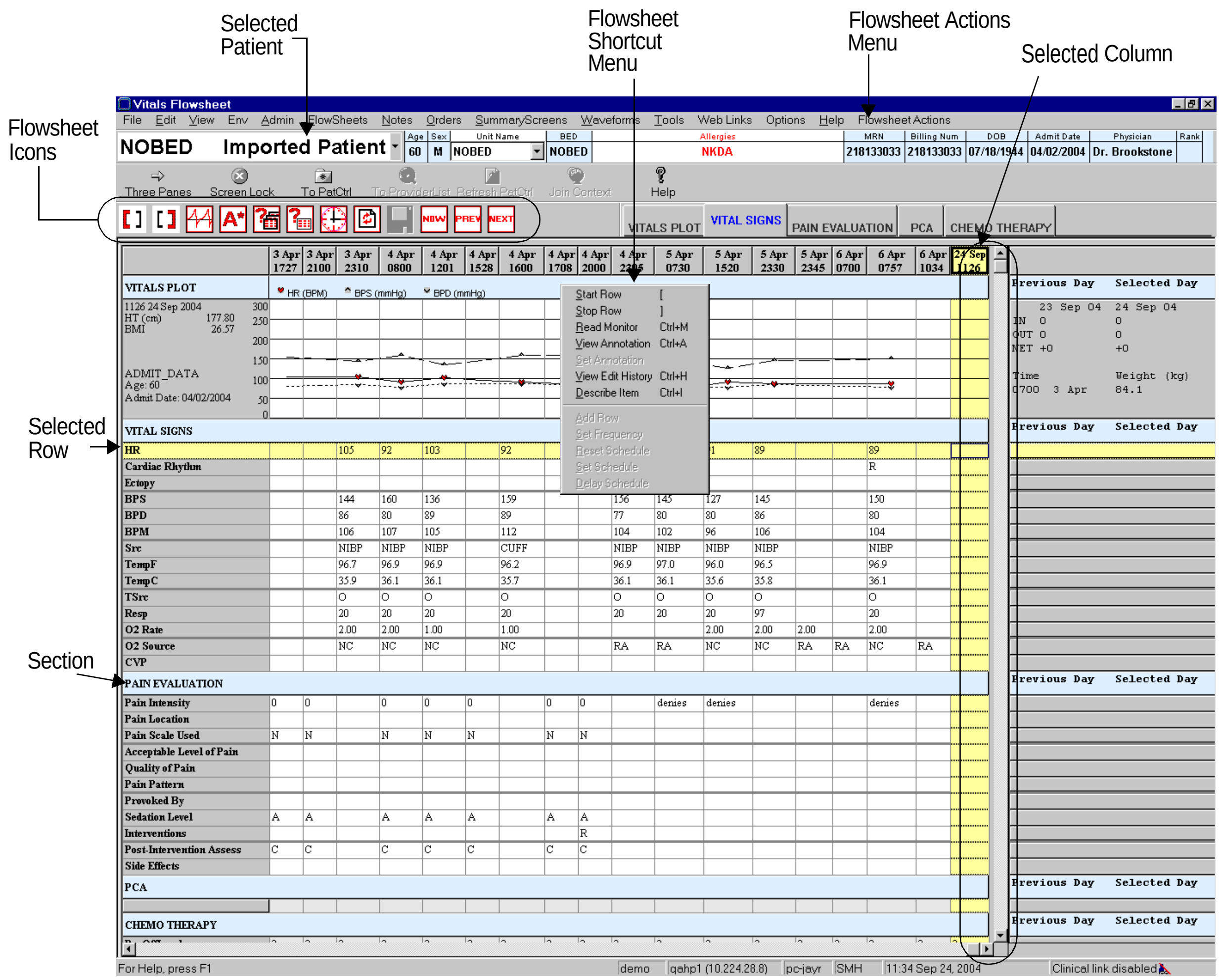
3

This section describes general features that are available in most flowsheets. All Essentris flowsheets can be configured to the requirements of the hospital and each unit within the hospital. Some flowsheet configurations are restricted by charting protocol.

Individual flowsheets and their specialized features are described in the **Flowsheet Specifics** section beginning on page 85 in this manual.

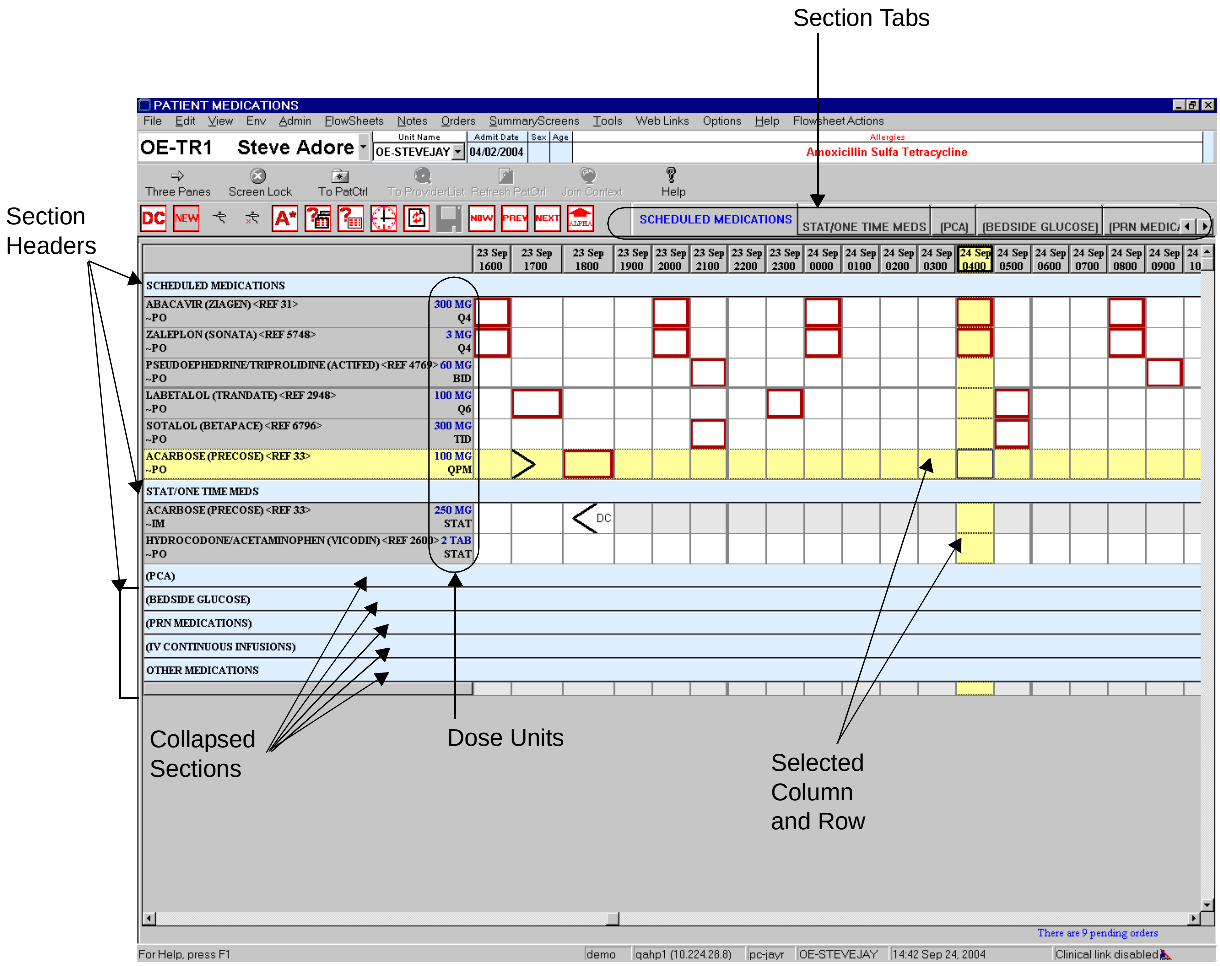
## Flowsheet Display

A flowsheet contains sections of data displaying clinical information for a selected patient. Patient data is organized into rows and columns in a grid-like format. Each row contains information about a specific data item. The columns organize the data by date and time. A cell is located at the intersection of a row and a column.



The general features of a flowsheet display are as follows:

- Flowsheet **data cells** are used to record patient data for a particular data item (row) at a particular **date and time** (column). A flowsheet cell can be configured with a pull-down **choicelist**.
- Rows are arranged in pre-configured **sections**.
- The section header rows display in pale blue for easy identification.
- Click on a section header to collapse or expand the section rows.
- The selected column and row are highlighted in pale yellow.
- The cursor defaults to a predefined date-and-time column (usually the current date and time) when a flowsheet is first opened.
- Section tabs are located at the top of the flowsheet for quick access to any section. Click on a tab to move that section to the top of the display.
- Column width is set by the minimum width required to display cell data, time columns, and column labels.
- A bold vertical line is shown every eight hours in the time columns as a visual aid.
- Every third horizontal line on a flowsheet is bolder than the others as a visual aid.



## Flowsheet Sections

Essentris flowsheets are designed by each hospital to include one or more of the following section types:

- **Standard Section** - A standard section is configured in a grid-like format with data item rows and date-and-time columns. Standard sections contain pre-defined **standard rows** (rows that always appear on a flowsheet). Users can display **optional rows** in standard sections with the Add Row feature.

| | 18 Apr 0602 | 18 Apr 0612 | 18 Apr 0649 | 18 Apr 0906 | 18 Apr 1039 | 18 Apr 1108 | 18 Apr 1230 | 18 Apr 1240 | 18 Apr 1301 | 18 Apr 1313 | 18 Apr 1440 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ARTERIAL BLOOD GASES | | | | | | | | | | | |
| **pHa** | 7.20 | | | | 7.22 | | 7.20 | 7.19 | | | 7.13 |
| **PaCO2** | 69 | | | | 71 | | 63 | 65 | | | 81 |
| **PaO2** | 40 | | | | 29 | | 35 | 32 | | | 64 |
| **HCO3** | 26.7 | | | | 28.3 | | 24.0 | 24.3 | | | 26.6 |
| **BE** | -2.7 | | | | -1.3 | | -4.8 | -4.9 | | | -4.0 |
| **%O2Hgb** | 76.9 | | | | | | 71.2 | 71.8 | | | 88.4 |
| **THgb** | 13.4 | | | | | | 11.7 | 12.7 | | | 11.6 |
| **A-a Grad** | | | | | | | | | | | |
| **AaDO2** | | | | | | | | | | | 567 |
| **SaO2** | 77.8 | | | | | | 72.1 | 72.7 | | | 89.6 |
| **MetHgb** | 0.80 | | | | | | 0.70 | 0.70 | | | 1.10 |
| **COHgb** | 0.30 | | | | | | 0.50 | 0.60 | | | 0.20 |

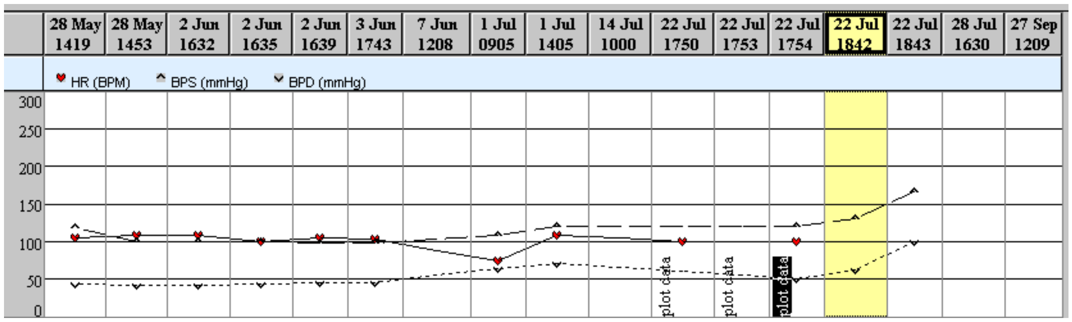
- **Ordered Item Section** - An ordered item section is similar to a standard section, but does not contain standard rows. An ordered item section only contains rows after an ordered item is acknowledged and stored. As ordered items are acknowledged, the ordered item section expands to display the new ordered item rows. As ordered items are discontinued, the ordered item rows drop off the flowsheet and the section is compressed.

| | | 26 Sep 1700 | 26 Sep 1800 | 26 Sep 1900 | 26 Sep 2000 | 26 Sep 2100 | 26 Sep 2200 | 26 Sep 2300 | 27 Sep 0000 | 27 Sep 0100 | 27 Sep 0200 | 27 Sep 0300 | 27 Sep 0400 | 27 Sep 0500 | 27 Sep 0600 | 27 Sep 0700 | 27 Sep 0800 | 27 Sep 0900 | 27 Sep 1000 | 27 Sep 1100 | 27 12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| SCHEDULED MEDICATIONS | | | | | | | | | | | | | | | | | | | | | |
| VITAMINS A/D () <REF 6273> 120 APPL PO | In-AM X1 | | | | | | | | | | | | | | | | | | | | |
| VANCOMYCIN (VANCOCIN) <REF 5581> 1 gm IV<br>»x2 doses | Q24 | | | | | | | | | | | | | | | | | | | | |
| LEVOFLOXACIN (LEVAQUIN) <REF 3021> 500 MG IV<br>»x48 hrs | Q24 | | | | | | | | | | | | | | | | | | | | |
| CARAFATE 1 Gm NG<br>»DC when extubated | Q6 | | | | | | | | | | | | | | | | | | | | |
| FLUCONAZOLE IVPB (DIFLUCAN) <REF 2132> 200 MG IV<br>»x48 hrs | Q24 | | | | | | | | | | | | | | | | | | | | |
| RIFAMPIN () <REF 4888> 600 MG NG<br>»x48 hrs | Q24 | | | | | | | | | | | | | | | | | | | | |
| ASPIRIN EC 325 mg PO<br>»Start POD #1<br>START ASA ON 5/30/04 | QD | | | | | | | | | | | | | | | | | | | | |
| METOCLOPRAMIDE (REGLAN) <REF 3542> 5 MG PO | BID | | | | | | | | | | | | | | | | | | | | |
| PEPCID 20 mg PO IV<br>»Initiate post-extubation | Q12 | | | | | | | | | | | | | | | | | | | | |

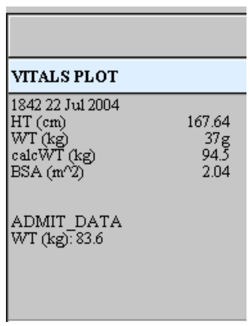
- **Annotation Section** - An annotation section is configured in the same grid-like format as a standard section and usually appears at the bottom of a flowsheet, but it is not used to chart data. An annotation section displays annotations that are charted for data items in the flowsheet.

| Additional Information | |
|---|---|
| ART BP-S | 1012 28 Mar, DEM, * - The systolic BP is slighly increased. Pt c/o pain in abdomen. |

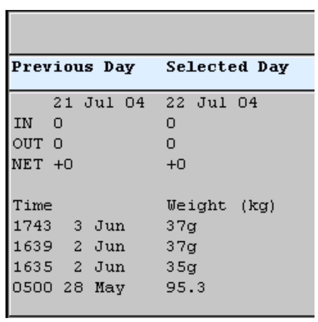
- **Plot Section** - A plot section is configured in a line graph format to display data trends over time for pre-defined data items. Events can be charted in the graph to display additional information about changes in data trends.




- **Summary Box Section** - A summary box is used to display pertinent data charted on another flowsheet or in a note that is pertinent to the flowsheet display.




- **Calculated Sections** - A calculated section is configured with built-in formulas to display information computed from charted data.




**Summary Data** - The right side of some flowsheets can optionally show summary data for the respective rows in the flowsheet. The summary data can be yesterday and today's totals (Vitals Plot summary uses Previous and Current totals), highest values, lowest values, a range of values, or all values. When **All** is selected and if more than 10 characters are to be displayed, an ellipse (. . .) appears to indicate that there is additional data. A question mark (?) displays to notify the user that a value is ambiguous. For example, when a dose is shown as a percentage or as Tablet.

Note that Yesterday, Today, and the summary data is shown for the date and time selected on the flowsheet. The Summary Data feature can be configured for each data item, section, or the flowsheet. Contact CliniComp Client Services to configure this option. The following example shows summary data configured to display the range for the flowsheet data.

| VITAL SIGNS | | | | | | | | | | Previous Day | Selected Day |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Heart Rate | | | | | | 26 | 27 | 24 | 25 | 26-27 | 24-25 |
| Rhythm | | | | | | | | | | | |
| Ectopy | | | | | | | | | | | |
| Rhythm | | | | | | | | | | | |
| NBP S | | | | | | 120 | 121 | 115 | 110 | 120-121 | 110-115 |
| NBP D | | | | | | 79 | 80 | 75 | 65 | 79-80 | 65-75 |
| B/P Mean | | | | | | 93 | 94 | 88 | 80 | 93-94 | 80-88 |
| ABP S | | | | | | 130 | 135 | 127 | 135 | 130-135 | 127-135 |
| ABP D | | | | | | 80 | 79 | 70 | 65 | 79-80 | 65-70 |
| B/P Mean | | | | | | 97 | 98 | 89 | 75 | 97-98 | 75-89 |

## Data Entry in Flowsheets

Flowsheet data cells are used to record patient data for a particular data item (row) at a particular date/time (column). A flowsheet data cell can be configured to contain free text, an enforced choicelist, a non-enforced choicelist, the Read Monitor feature, or the Copy Forward feature.

### Free Text Entry

A data cell configured as free text entry does not display a choicelist when it is selected with the cursor. To enter data, select the data cell and type the patient data. To delete data, click on the data cell and press the space bar.

Free text data cells are limited to a maximum number of characters or numbers. Numerical free text data cells can also be configured with a data range for each data item (row). A warning message appears if a free text entry does not fall within the allowed limits.

### Enforced Choicelist

A data cell configured with an enforced choicelist displays a choicelist when it is selected. To enter data, select the data cell and click on a member of the choicelist or key in the numerical value of the member. More than one selection can be added to the data cell while the choicelist is open, if the selections are compatible. To delete data, click on the data cell and press the space bar. Patient data must be selected from the choicelist. Free text entry is not permitted.

### Non-enforced Choicelist

A data cell configured with a non-enforced choicelist displays a choicelist when it is selected. To enter data, select the data cell and click on a member of the choicelist, type the data manually, or key in the numerical value of the member. More than one selection can be added to the data cell while the choicelist is open, if the selections are compatible. To delete data, click on the data cell and press the space bar. Patient data can be selected from the choicelist or you can enter free text.

## Read Monitor Feature

A data cell configured with the Read Monitor feature can import patient data from a device, such as a physiological monitor or IV Pump. For step-by-step instructions, see “Read Monitor” on page 74.

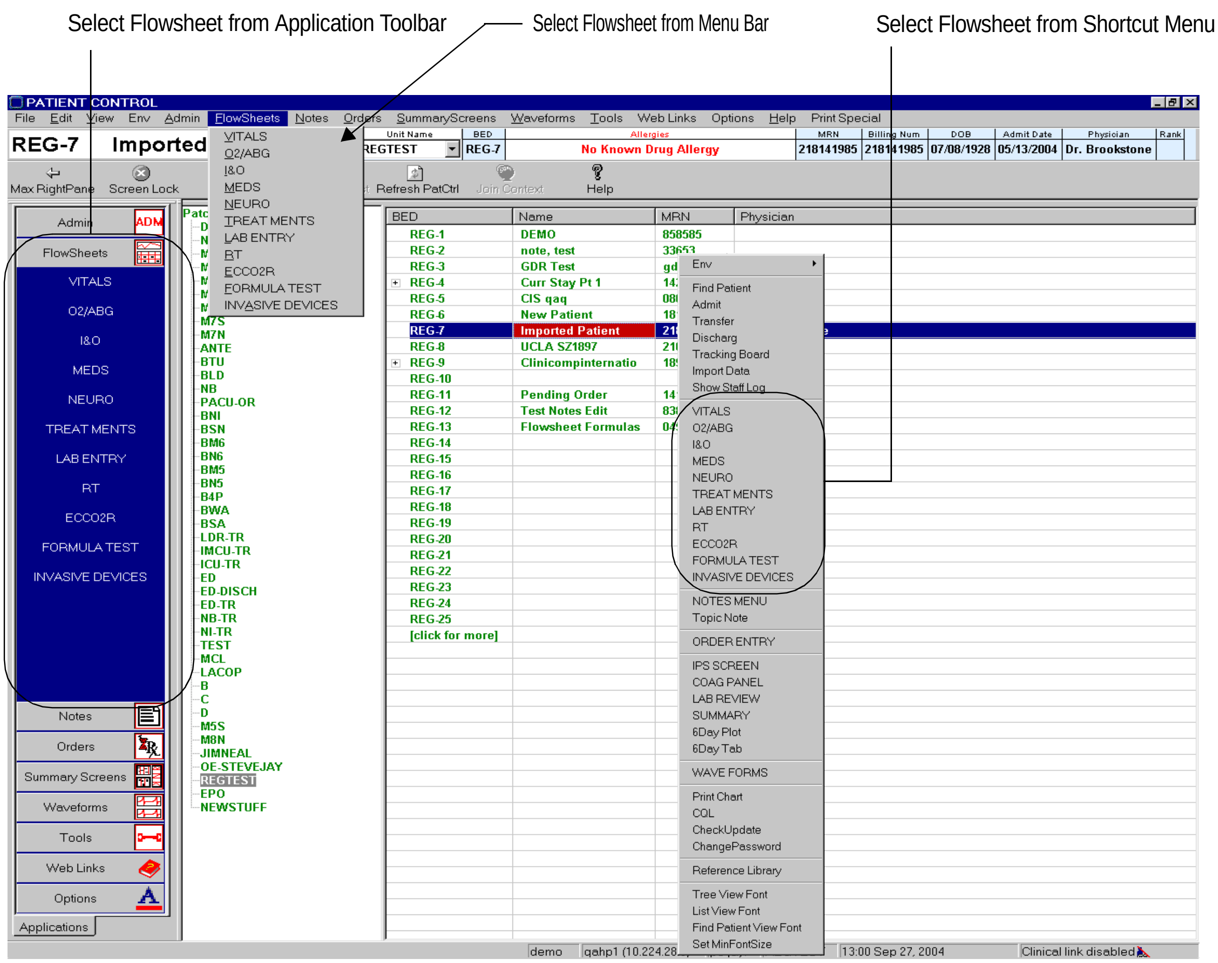
## Copy Forward Feature

A flowsheet section configured with the Copy Forward feature allows users to copy patient data that is charted in a previous date-and-time column and paste it in the data cells for the selected date-and-time column. Patient data that is copied forward can be modified with the updated information and stored. Be aware that the Copy Forward feature is a configurable option and might not apply to all flowsheet sections at your facility. For step-by-step instructions, see “Copy Forward” on page 62.

## Accessing a Flowsheet

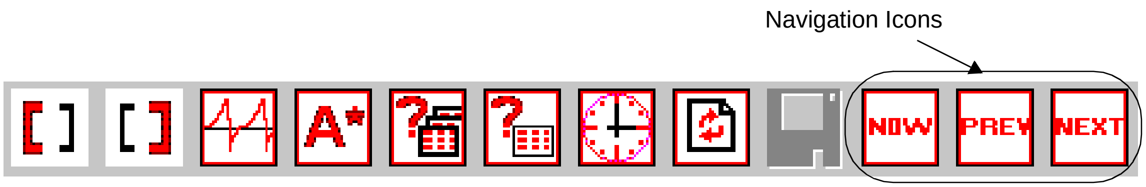
Use the following steps to open a flowsheet for a selected patient:

| Step by Step | Additional Information |
|---|---|
| 1. Select a patient from the Patient Control screen.<br>2. Select a **Flowsheets** from the Application Toolbar, the Menu Bar, or the Shortcut Menu. | Using the mouse, click on the row containing the patient name to highlight it. The patient is selected. See the example Patient Control screen below. |



## Navigating Flowsheets

The icon bar contains navigation icons used to simplify moving from page-to-page in the flowsheet. The icons are **NOW**, **PREV**, and **NEXT**. The icons are in addition to horizontal scrolling.




**NOW Icon**

Click the **NOW** icon to position the flowsheet in the most recent time column.

**PREV Icon**

Use the **PREV** icon to move the flowsheet display one page of data back in time. The PREV icon is greyed out when there are no previous pages.

**NEXT Icon**

Use the **NEXT** icon to move the flowsheet one page of data forward in time. The **NEXT** icon is greyed out when there are no later pages.

**Scroll Bar**

The scroll bar can function similarly to the **PREV** and **NEXT** icons. Click on the right end of the scroll bar to move the display forward in time one page, or click on the left end of the scroll bar to move the display backward in time one page. Click and hold down the mouse key on the left- or right-end arrow to scroll continuously through the flowsheet.

**Scrolling with the Mouse**

The mouse wheel can be used to scroll up and down in any flowsheet.

## Flowsheet Actions

The following functions are available in most flowsheets. Some general functions are available in all sections of a flowsheet, but others are specific to a particular type of section. For example, the **Describe Item** function is available in all sections of a flowsheet, but the **Discontinue** (**D/C**) function only applies to Ordered Item sections.

To see the functions that are available for a particular flowsheet section, click a data cell in a section (making it the active cell) and click the **Flowsheet Actions** menu on the Menu Bar. All functions that are available for that particular section of the flowsheet are listed in black, while unavailable functions appear in gray.

The following functions are available in **all** sections of a flowsheet:

- Copy Forward
- Describe Item
- Enter Time
- Find Row
- Refresh Flowsheet
- Annotation
- View Edit History
- Store Changes
- Zoom In/Zoom Out

The following functions are available in **Standard** sections of a flowsheet:

- Add Row
- Start Row
- Stop Row
- Read Monitor

The following functions are available in **Ordered Item** sections of a flowsheet:

- Discontinue (D/C)
- New Order
- Set Frequency
- Set Schedule
- Delay Schedule
- Reset Schedule

The following function does not appear on the menu, but is available in certain calculated sections of a flowsheet:

- Toggle Tooltip

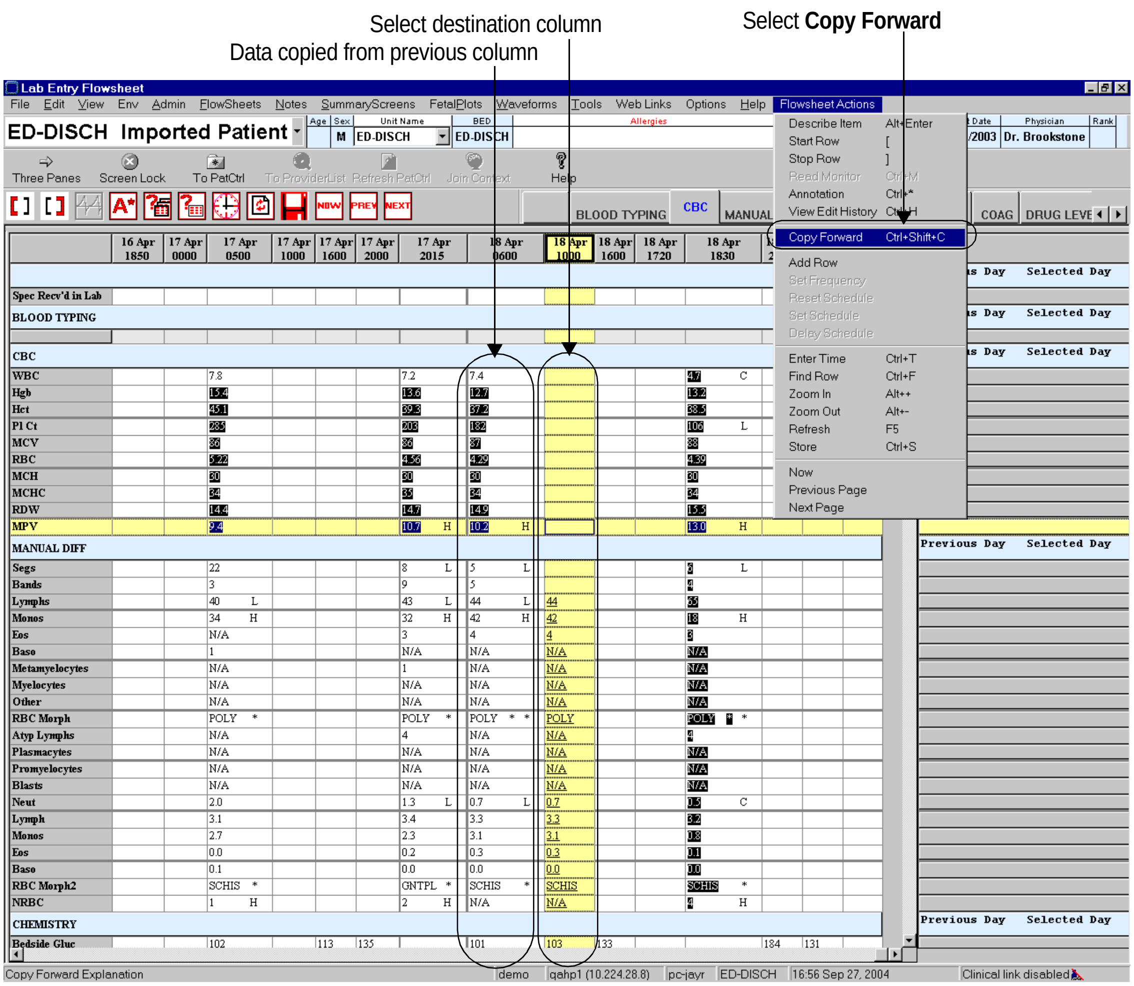
## Copy Forward

Patient data can be copied forward from the previous column containing data to the selected column, and modified with the updated information. Note that the **Copy Forward** feature is a configured option and might not apply to all flowsheet sections at your facility. The feature can be configured for numeric data, alpha data, or both.

Note

*The Copy Forward feature does **not** copy Annotations or Flags such as High (H) and Low (L).*

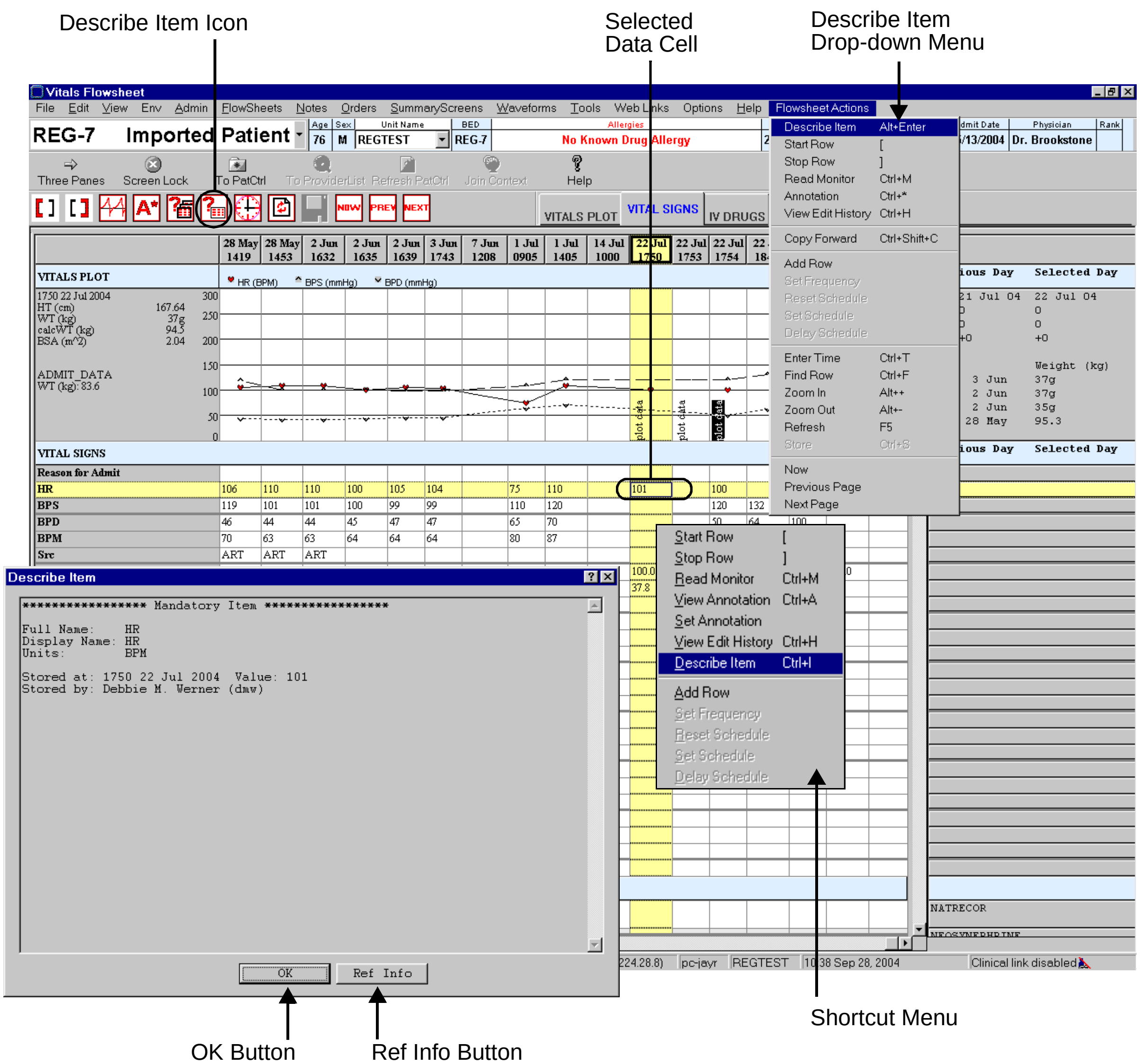
| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell in the next date-and-time column to receive the data from the previous date-and-time column. | |
| 2. Click **Flowsheet Actions** on the Menu Bar and select **Copy Forward** from the drop-down menu. | The patient data in the previous date-and-time column that contains data is copied forward to the the selected date-and-time column. |



## Describe Item

Use the **Describe Item** feature to view information including the full name, display name, data value, user that stored data, and units (if applicable) for a flowsheet data cell.

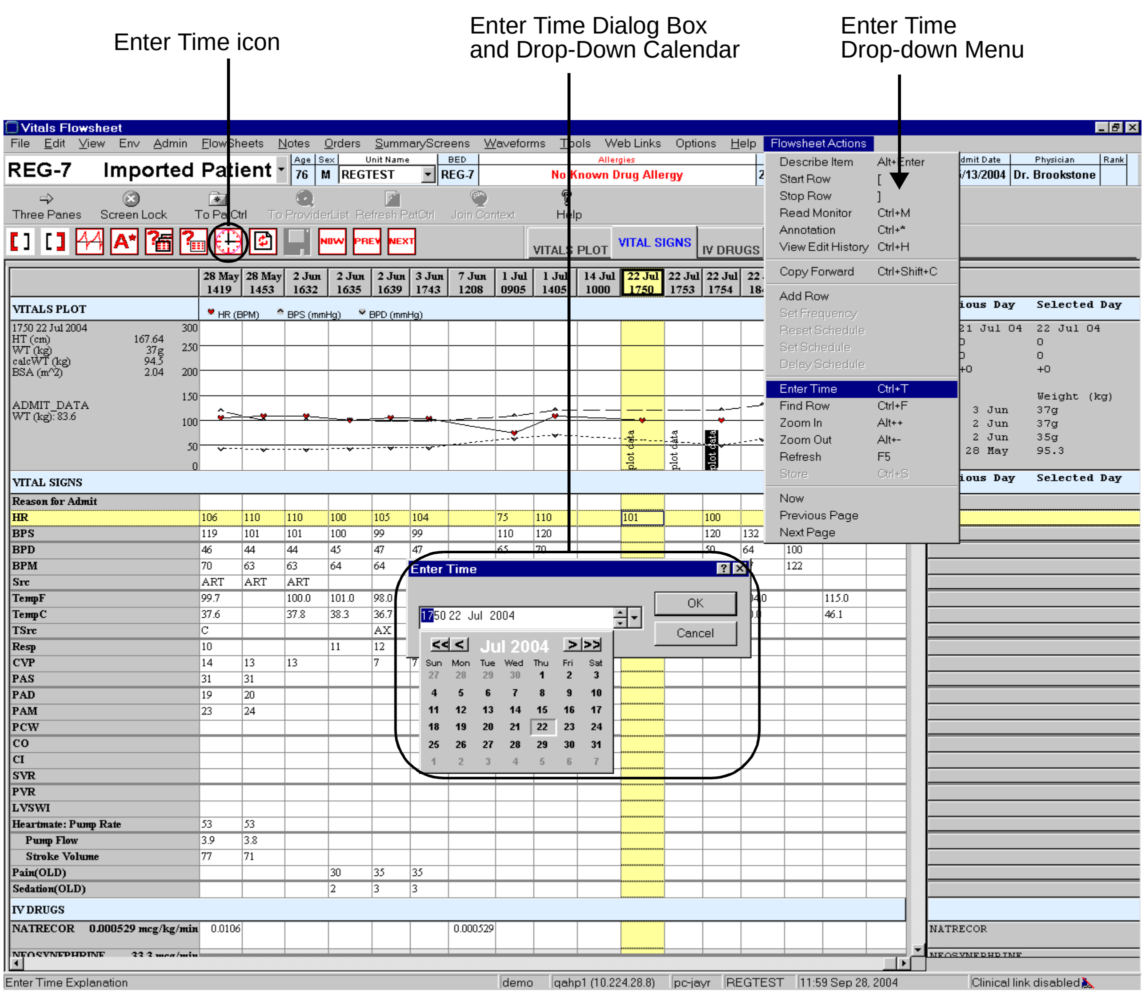
| Step by Step | Additional Information |
| --- | --- |
| 1. Select a data cell. | |
| 2. Select **Describe Item** from the **Flowsheet Actions** drop-down menu, *or. . .* the **Shortcut Menu**, *or. . .* click the **Describe Item** icon. | The **Describe Item** dialog box is displayed. It is a text box from which information can be copied and then pasted into another Windows application such as Microsoft Word. |
| 3. To close the **Describe Item** dialog box, click the **OK** button. | Click the **Ref Info** button to show reference information about this vital sign. |



## Enter Time

Use the **Enter Time** feature to add a new column between configured columns on a flowsheet, or to reposition the flowsheet at a specific date/time column.

| Step by Step | Additional Information |
|---|---|
| 1. Select **Enter Time** from the **Flowsheet Actions** on the Menu Bar, or click the **Enter Time** icon. | The **Enter Time** dialogue box is displayed. |
| 2. Click on the date or time in the **Enter Time** dialogue box. | The date or time is highlighted. |
| 3. Modify the value using the small arrows. | |
| 4. Click the large down arrow to select a date from a drop-down calendar. | The drop-down calendar menu appears below the **Enter Time** dialogue box. |
| 5. Click the **OK** button. | The new column appears, or the flowsheet displays the specified date-and-time column. |

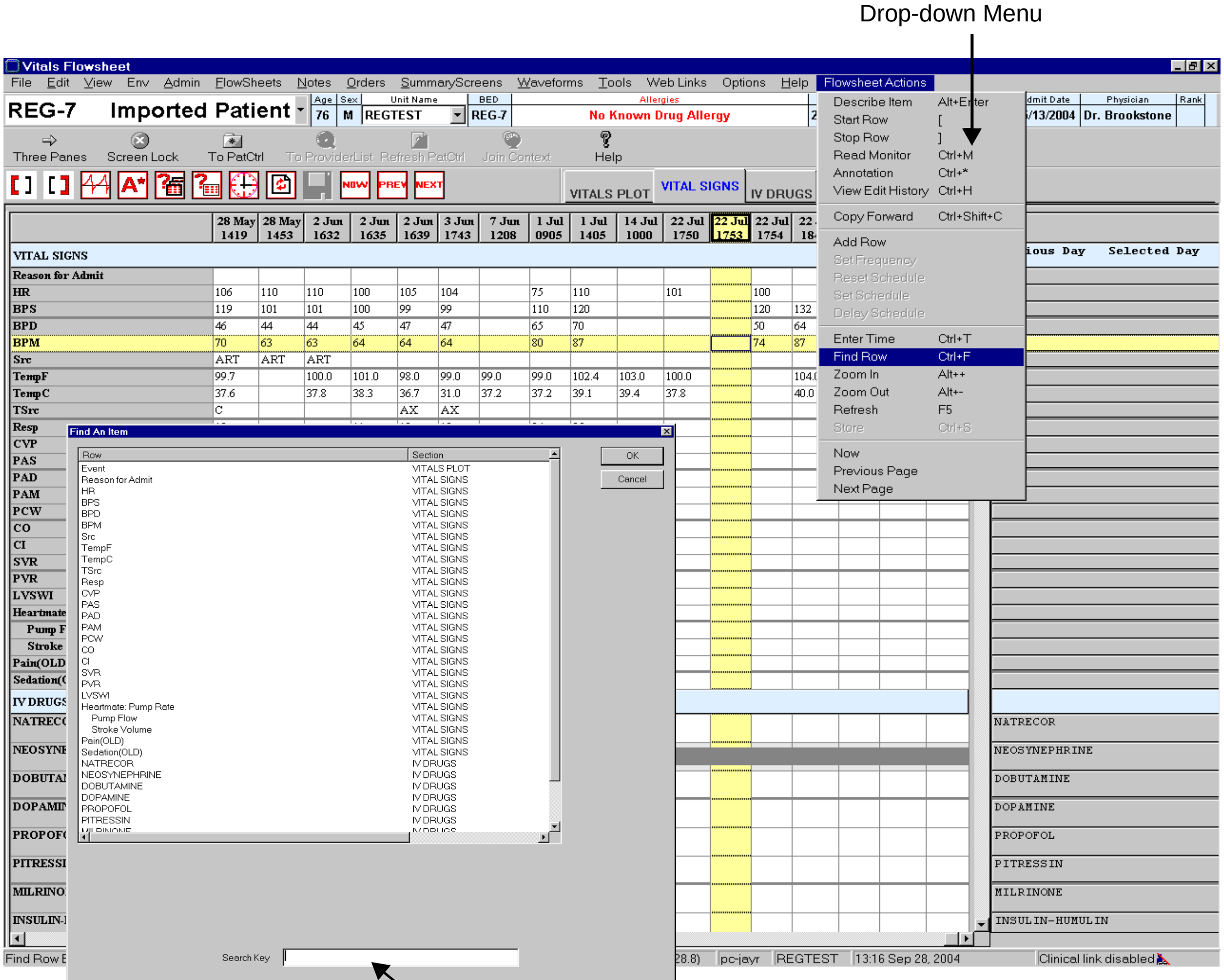


## Find Row

Use the **Find Row** feature to quickly find a row in a flowsheet.

| Step by Step | Additional Information |
|---|---|
| 1. Select **Find Row** from the **Flowsheet Actions** drop-down menu. | The **Find An Item** dialog box appears. |
| 2. Scroll through the list of rows and sections to find a specific row or section, *or. . .* type the first few letters of the row or section you are searching for in the **Search Key** field. | It is not necessary to type the entire name of the row or section in the **Search Key** field. The search is not case-sensitive. |
| 3. Click on the required row. | The selected row is highlighted. |
| 4. Click the **OK** button. | The **Find An Item** dialog box closes and the flowsheet displays the selected row. |

Find Row
Drop-down Menu

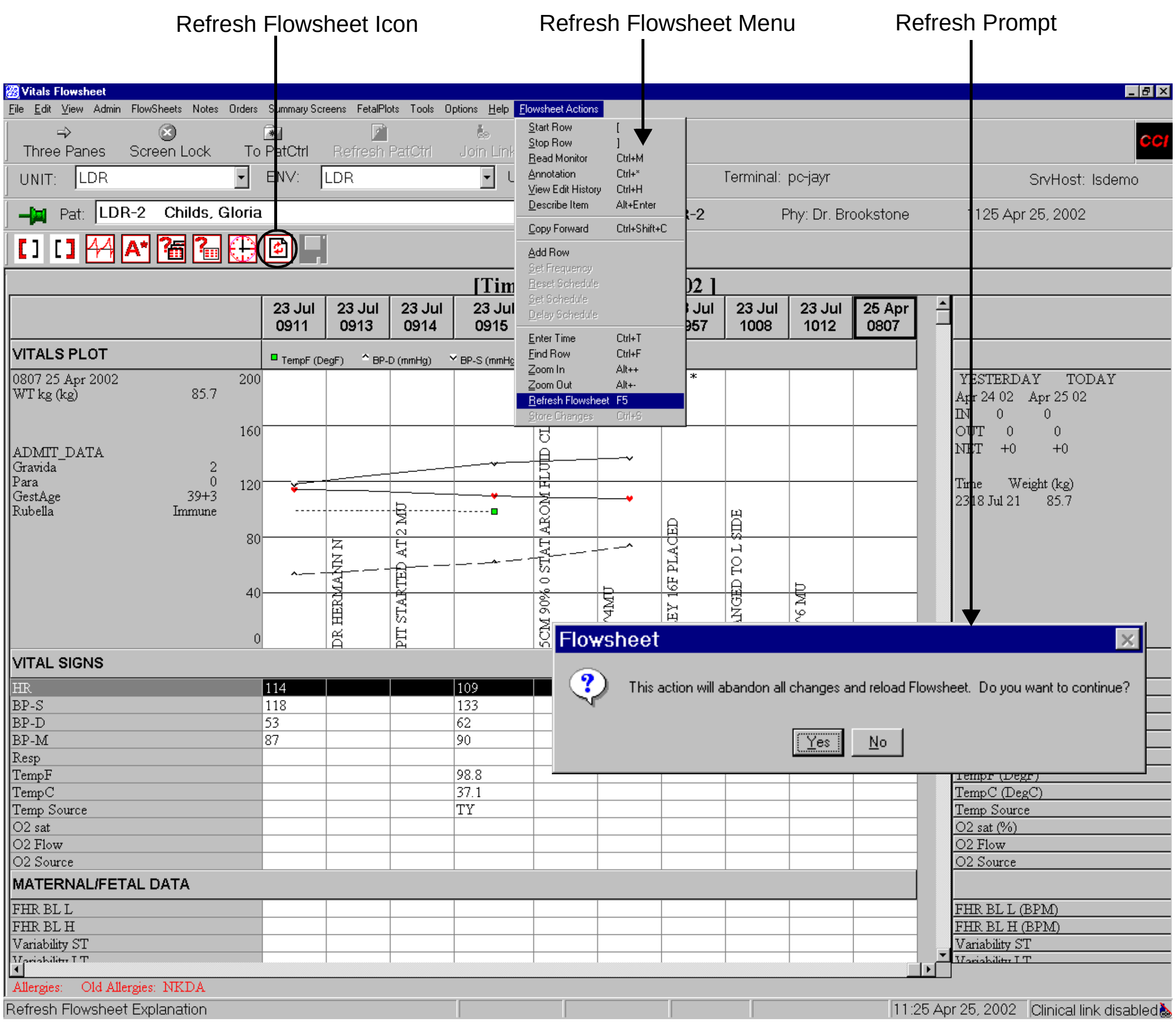



Search Key

## Refresh Flowsheet

Use the **Refresh Flowsheet** feature to update a flowsheet screen with any new data stored on the flowsheet by other users at different terminals. Store unsaved data on your terminal. Unsaved data is deleted by the refresh.

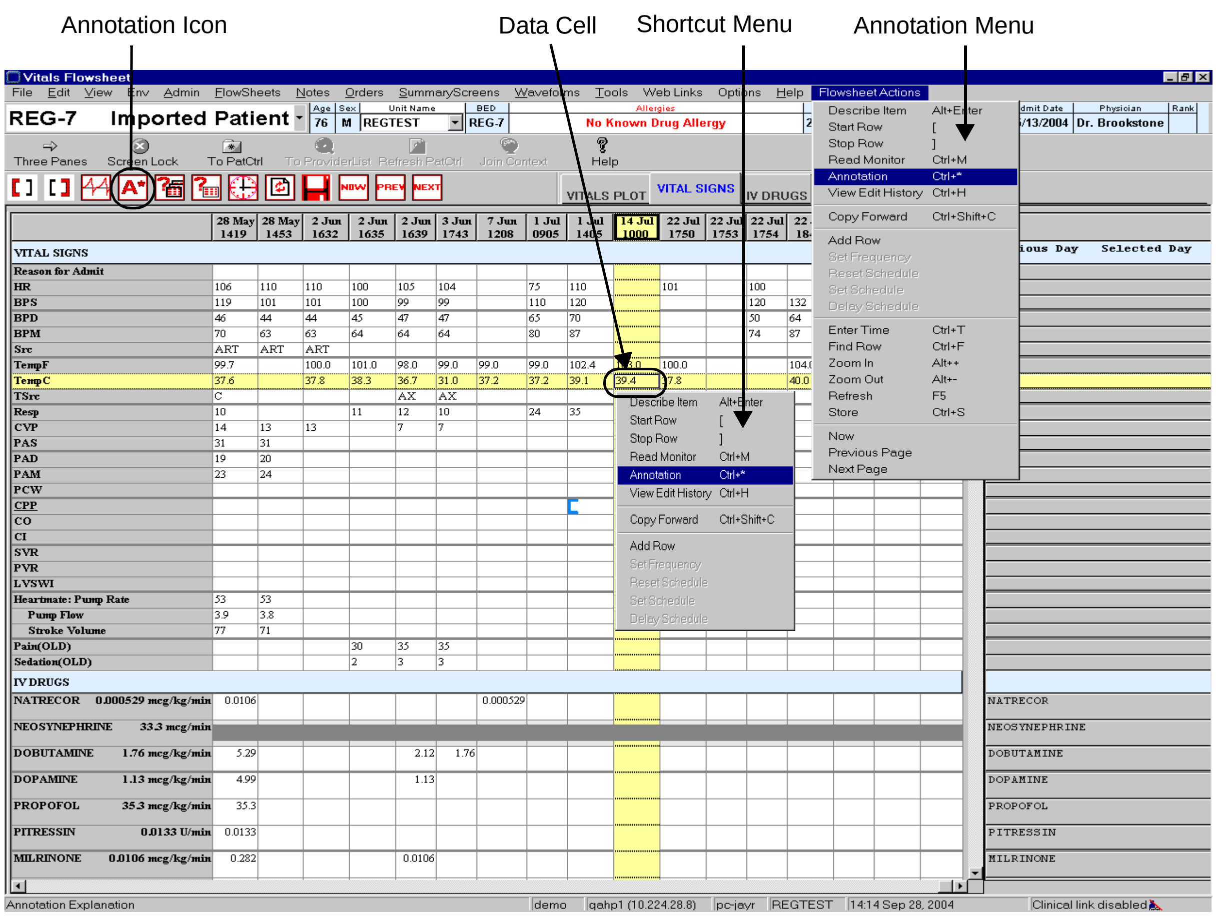
| Step by Step | Additional Information |
|---|---|
| 1. Click **Flowsheet Actions** on the Menu Bar and select **Refresh** from the drop-down menu, *or. . .* click the **Refresh Flowsheet** icon. | If unsaved data is present, the **Flowsheet** message box appears. Click **Yes** to refresh the flowsheet without saving your changes. Click **No** to cancel the refresh operation. |



## Annotation

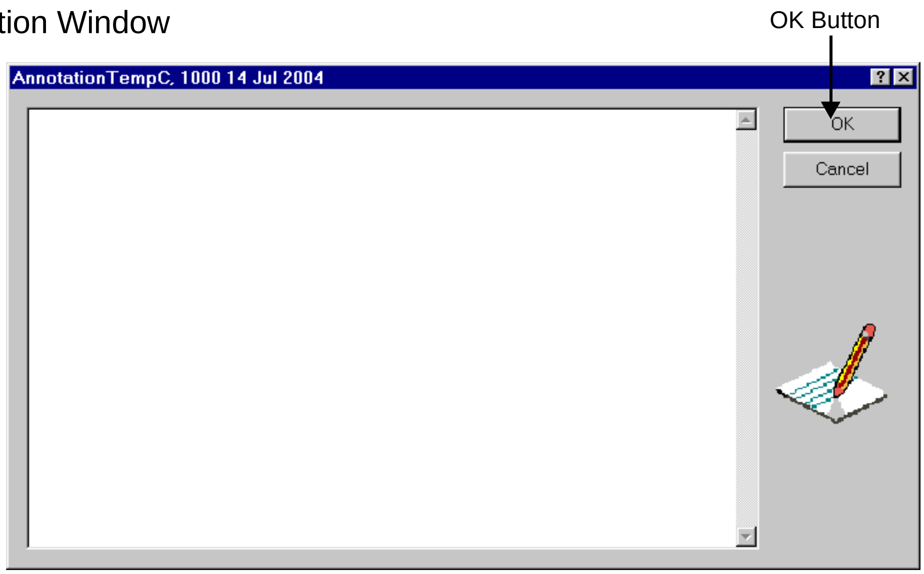
Use the **Annotation** feature to add short notes or text messages to data cells in a flowsheet, and to view existing notes. An annotation is represented by an asterisk in a flowsheet data cell. Annotations can also be listed in the **Notes** menu. Annotations for external orders can be printed with the flowsheet. See your System Administrator.

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell for which you would like to create an annotation. | |
| 2. Select **Annotation** from the **Flowsheet Actions** drop-down menu, *or. . .* right-click the mouse in the data cell and select **Annotation** from the **Shortcut Menu**, *or. . .* click the **Annotation** icon, *or. . .* press the **Ctrl+*** keys on the keyboard. | The **Annotation** window appears. |



| Step by Step | Additional Information |
| --- | --- |
| 3. Type the text message in the **Annotation** window. | |
| 4. Click the **OK** button to save the annotation, *or*. . .click the **Cancel** button to exit the **Annotation** window without saving new entries, if any. | The annotation is represented by the asterisk (*) character in the flowsheet data cell. The annotation can be configured to be a note called **Annotation** on the **Notes** menu. The note uses the date and time from the flowsheet column. |
| 5. To view an existing annotation, place the cursor in a cell containing an asterisk and use the options in Step 2 above. | The **Annotation** window opens to display the annotation text. |

Annotation Window

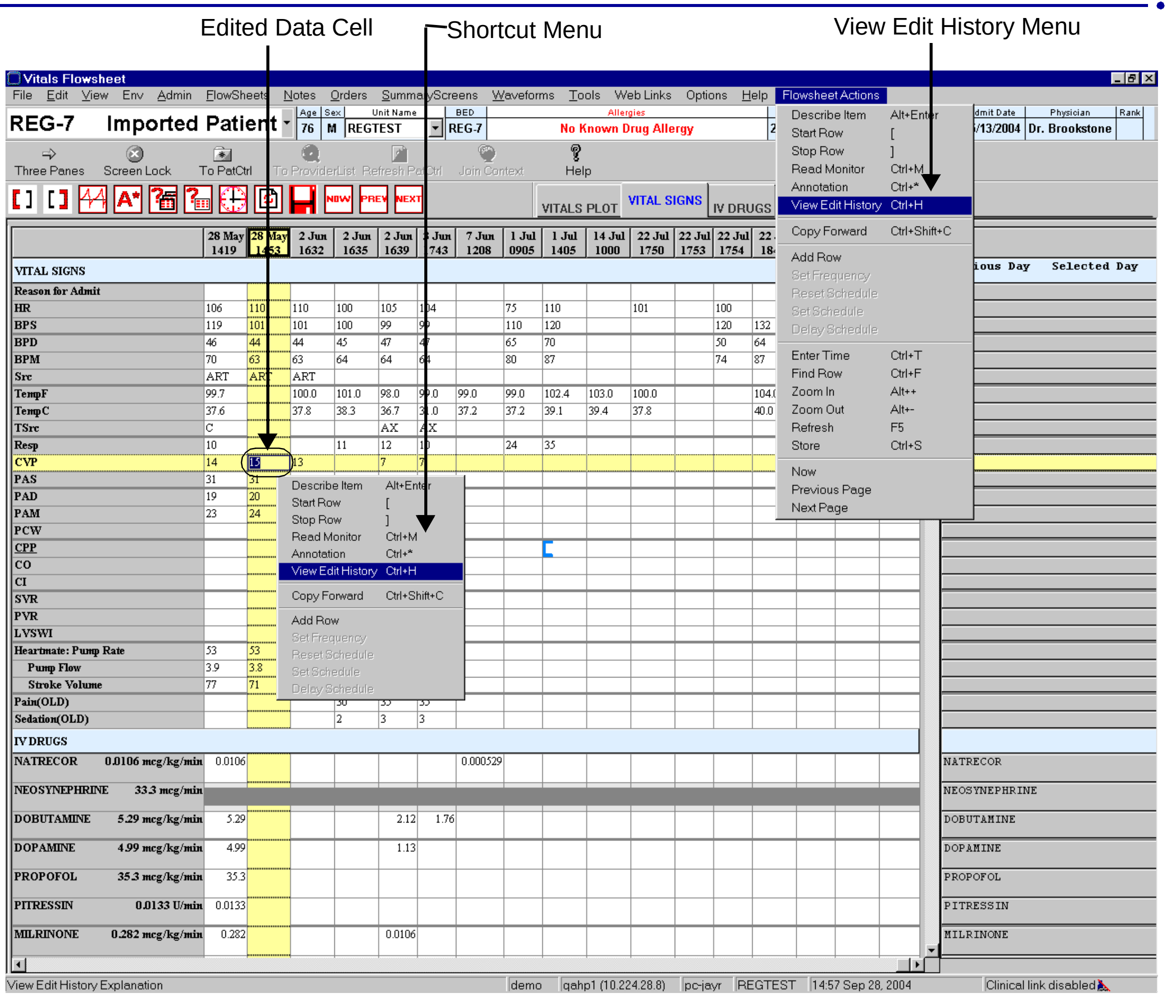


## View Edit History

Use the **View Edit History** feature to view changes that have been made to a data cell. The **Edit History** window is usually configured with the following fields:

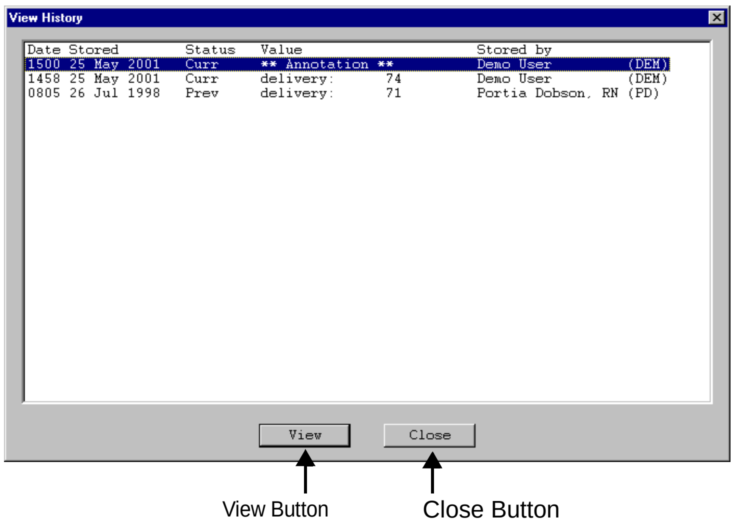
- Date Stored: Date and time the item was stored
- Status: Current or previous information
- Value: Value of the item
- Stored By: Name of user

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell that has been edited. | Data cells that have been edited appear in reverse video. |
| 2. Select **View Edit History** from the **Flowsheet Actions** drop-down menu, *or. . .* right-click in the data cell and select **View Edit History** from the **Shortcut Menu,** *or. . .* click the **View Edit History** icon. | The **View History** dialog box is displayed. Entries that show ****Annotation**** in the Value column contain additional information that is displayed by clicking the **View** button. |



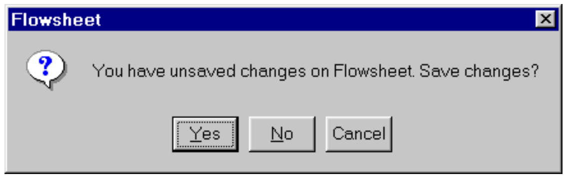
| Step by Step | Additional Information |
|---|---|
| 3. To close the **View History** dialog box, click the **Close** button. | The text in the **View History** dialog box can be copied pasted to another document. |
| 4. Use the **View** button to display **Annotation** entries. | The **Edit History** dialog box opens to display the annotation. |

View History Dialog Box

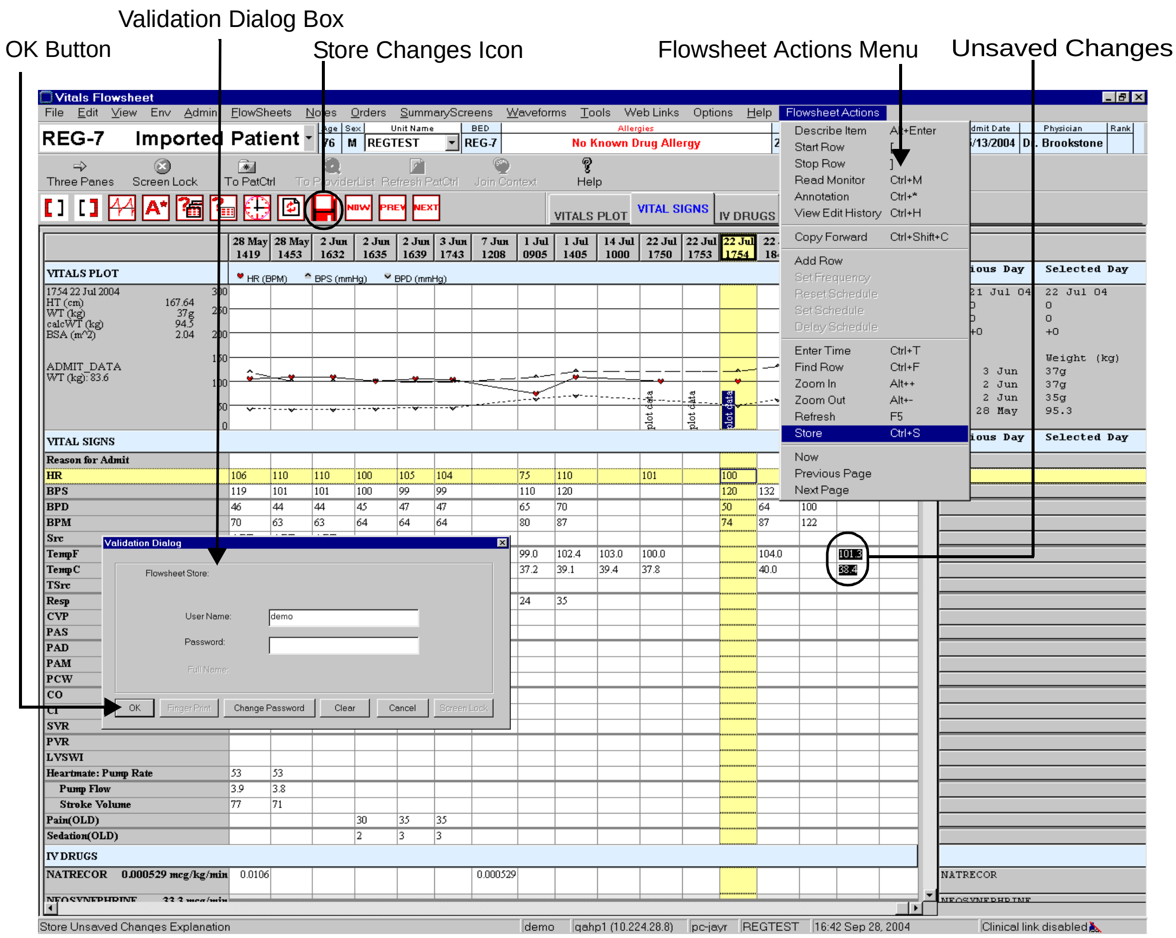


## Store Changes

New or modified patient data must be stored (saved) before exiting a flowsheet. Patient data that has not been stored is shown underlined. If you attempt to exit a flowsheet without storing new or modified data, a warning dialog box (shown below) gives you the choice to store the changes, or exit the flowsheet without storing the data.



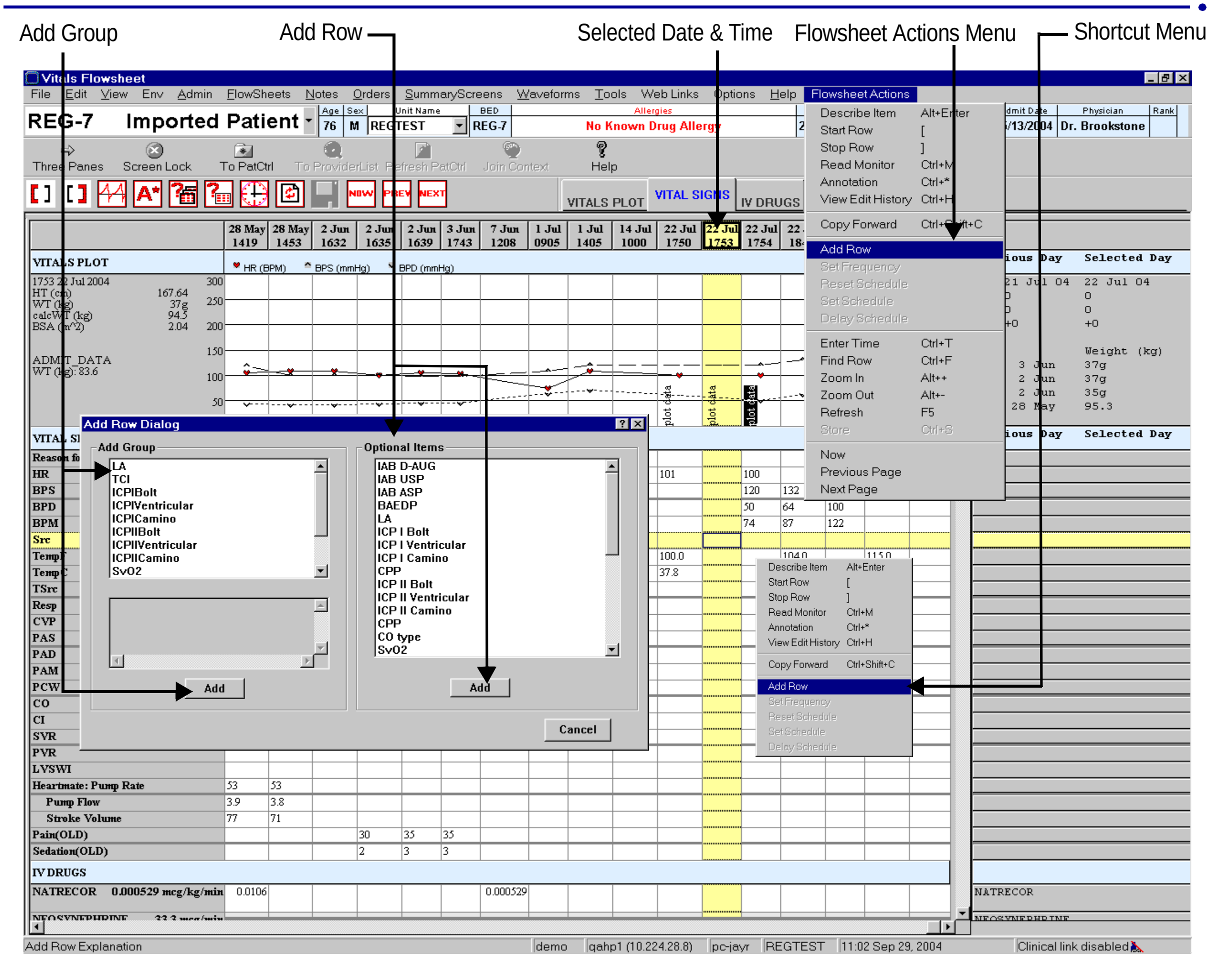

| Step by Step | Additional Information |
| --- | --- |
| 1. Select **Store Changes** from the **Flowsheet Actions** drop-down menu, *or. . .* click the **Store Changes** icon. | The **Validation Dialog** box appears. |
| 2. Enter your **User Name** and **Password**. | |
| 3. Click the **OK** button. | The patient data is stored in the flowsheet. |



## Add Row

Use the **Add Row** feature to add an optional row, or group of rows to standard flowsheet sections.

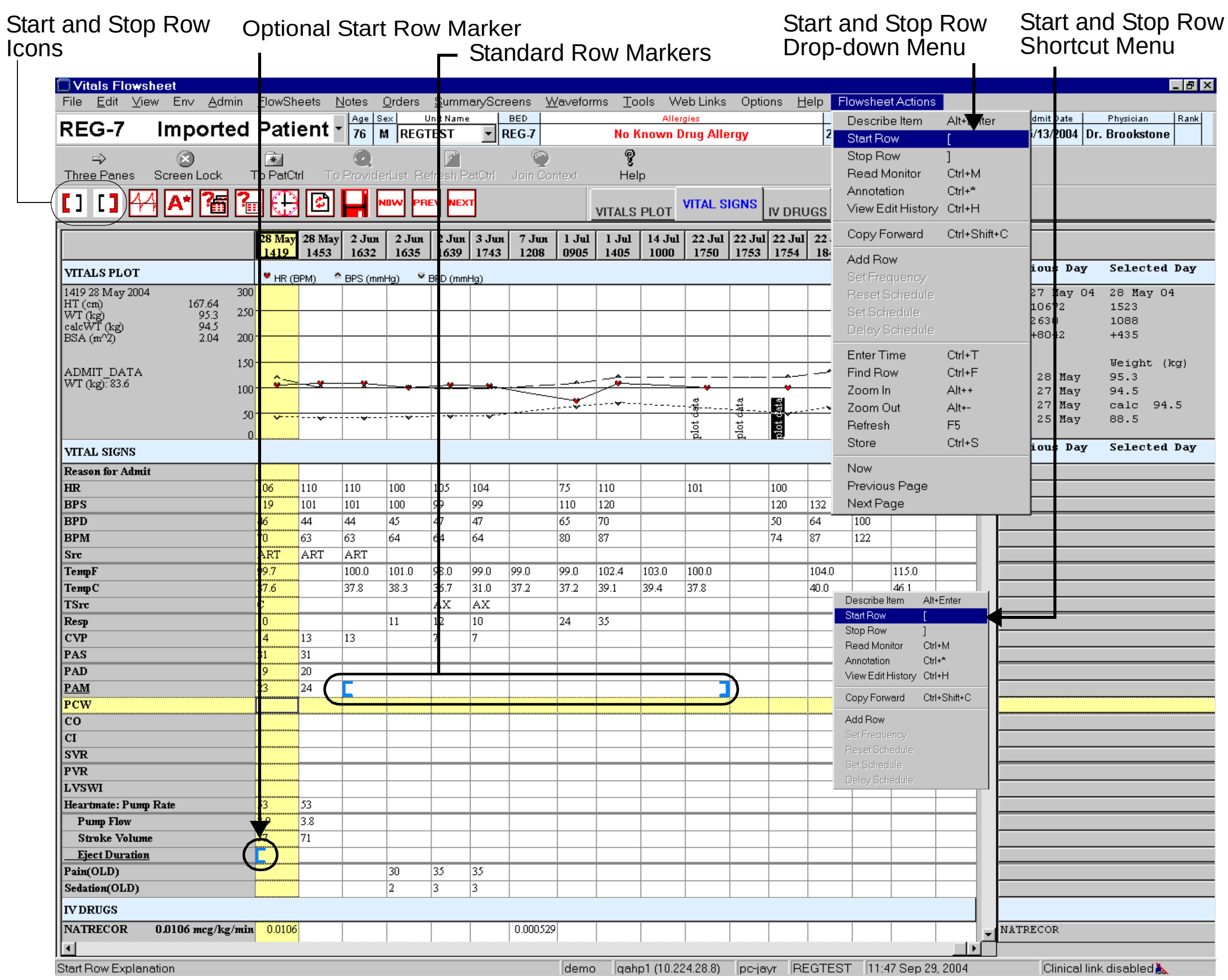
| Step by Step | Additional Information |
|---|---|
| 1. Select a date-and-time column for the Start Row marker. | The Start Row marker is placed in the new row under the selected date and time. |
| 2. Select the **Add Row** option from the **Flowsheet Actions** menu on the Menu Bar, *or. . .* right-click on an existing row and select **Add Row** from the **Shortcut Menu**. | The **Add Row Dialog** box appears. The **Add Row Dialog** box lists the optional rows and groups of related optional rows that are available for the flowsheet. |
| 3. To add a single row from the **Add Row Dialog** box, click on a row name in the **Optional Items** window and click the **Add** button. | The row and its Start Row marker are added to the flowsheet. |
| 4. To add a group of rows, click on a group name in the **Add Group** window and click the **Add** button. | The group of rows and their Start Row markers are added to the flowsheet. |



## Start Row and Stop Row Markers

In standard rows, **Start Row** and **Stop Row** markers are used to draw attention to a series of columns. A **Start Row** marker in an Optional Row designates when the row was added. Placing a **Stop Row** marker in an optional row designates that charting for that item has stopped, and the row drops off the flowsheet after a configurable time period. The **Start Row** and **Stop Row** features are used only in Standard sections of a flowsheet.

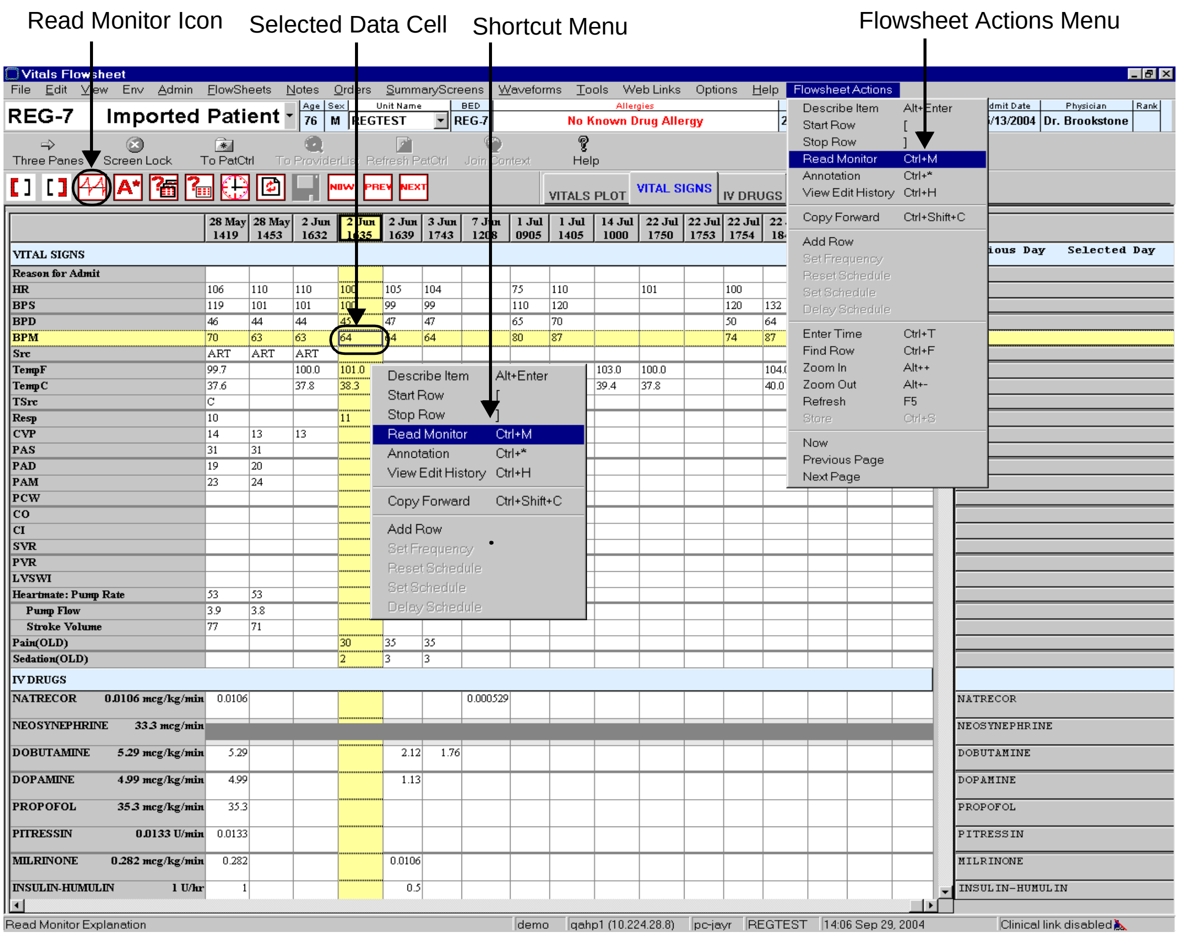
| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell to receive the marker. | |
| 2. Click **Flowsheet Actions** on the Menu Bar and select **Start Row** or **Stop Row** from the drop-down menu, *or. . .* right mouse click in the data cell and select **Start Row** or **Stop Row** from the **Shortcut Menu,** *or. . .* click the **Start Row** or **Stop Row** icon. | The marker is added to the selected data cell. Optional rows automatically display a **Start Row** marker designating when the row was added. **Note:** To place a **Stop Row** marker, a **Start Row** marker must be present. If a **Start Row** marker is not present, a message appears: *"This item has never been started - cannot stop item."* |



## Read Monitor

Use the **Read Monitor** feature to import patient data from a connected, pre-configured device, such as a physiological monitor or ventilator to an Essentris flowsheet.

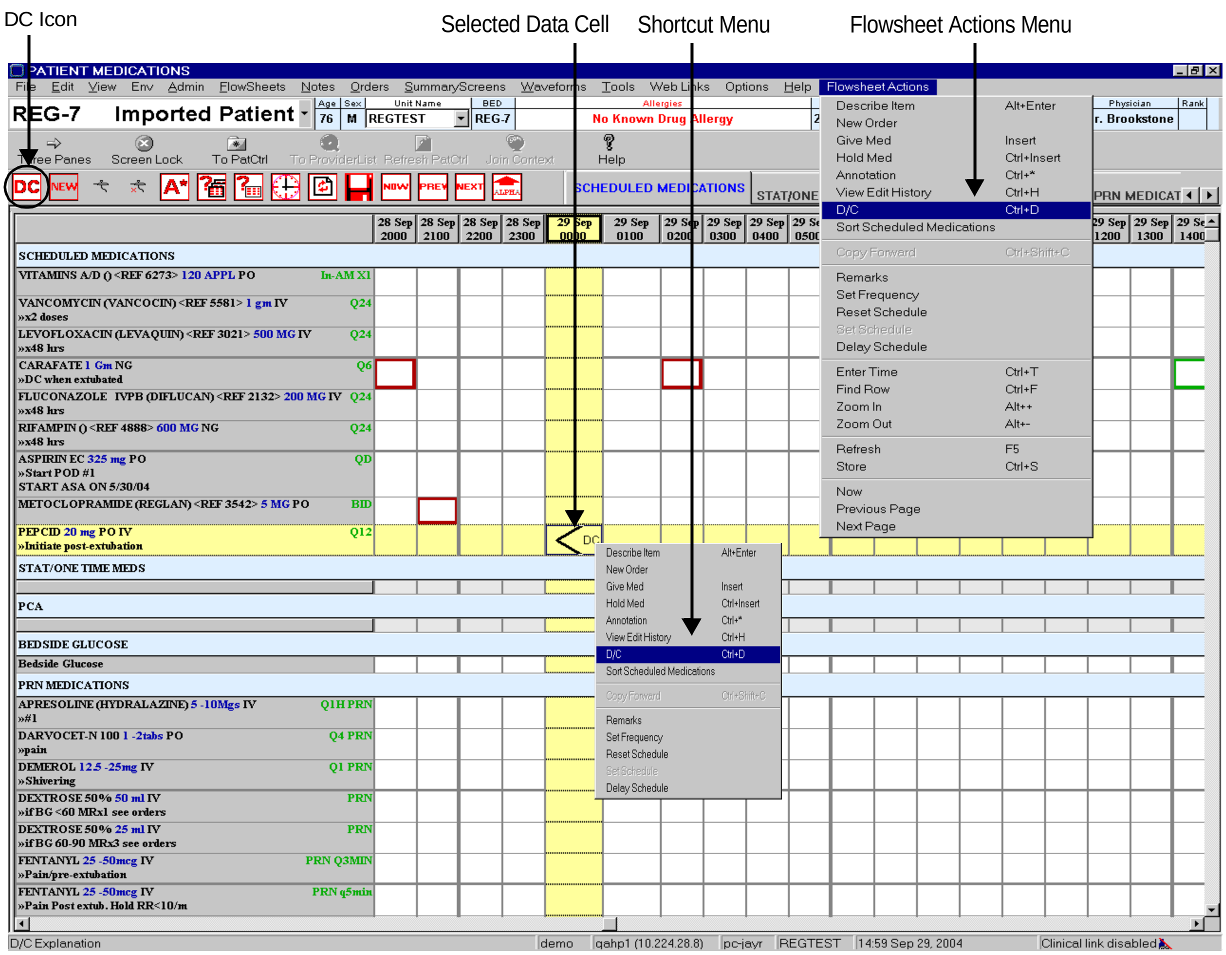
| Step by Step | Additional Information |
|---|---|
| 1. Select the column that you would like to import patient data into from device . | |
| 2. Select **Read Monitor** from the **Flowsheet Actions** drop-down menu, or. . .right-click in the data cell and select **Read Monitor** from the **Shortcut Menu**, or. . .click the **Read Monitor** icon. | All available patient data is imported from the device. |



## Discontinue an Order

Use the **Discontinue** (**D/C**) function in a flowsheet to **D/C** ordered items. **D/C** is available only in Ordered Item sections. A Discontinued row drops off of the flowsheet screen after a configured time period. A Discontinued row is discontinued on every flowsheet in which the ordered item appears. For sites with a pharmacy interface, external orders can be DCed from a flowsheet. This is an option configured by CliniComp Client Services.

| Step by Step | Additional Information |
|---|---|
| 1. Select the data cell for the order to be discontinued. | |
| 2. Select **D/C** from the **Flowsheet Actions** drop-down menu *or. . .*<br>right-click in the data cell and select **D/C** from the **Shortcut Menu,** *or. .*<br>click the **DC** icon**.** | An arrowhead appears in the selected data cell and all future medication markers are removed from the row.<br>To remove a **D/C**, toggle it off by placing the cursor in the data cell that contains the arrowhead and clicking **D/C**. Click again to toggle it on.<br>To adjust the **D/C** time, move the cursor to the desired data cell and click **D/C** again. |



## New Order

A new order can be initiated from the **Flowsheet Actions** menu, the **New** icon on the Icon bar, or from the shortcut menu. Refer to "Order Editor from a Flowsheet" on p. 198 for detailed instructions.

## Order Frequencies

Many ordered items, including medications and treatments are assigned frequencies. There are three types of frequencies that are available for ordered items.

### Single Dose Delivery

An ordered single-dose item is automatically discontinued after the dose is delivered. The data cell under the selected time shows the DC marker. The following frequencies are used for single-dose deliveries:

**Xn -** The **X** frequency order can be delivered any number of times before it is automatically DCed. For example, **X5** would be delivered five times and then DCed.

**STAT** - deliver immediately and DC.

### Periodic Frequency

An ordered item with a periodic frequency is delivered according to a specified time interval. The format for a periodic frequency is:

**Qn, where n = hours between deliveries**

The default schedule for a periodic frequency is created when the order is entered. For example, if the order is entered at 1300 with a frequency of Q4, the next delivery marker appears in the date/time columns for 1700, 2100, and so on.

A delayed schedule can be configured to start when the order is first delivered. The ordered Start Time is shown in the flowsheet as the start-time marker (>), but the first schedule marker for the treatment schedule is set when the first order is delivered. Store the order to display the entire schedule.

### Scheduled Frequency

An ordered item with a scheduled frequency is delivered at pre-determined hours of the day. Ordered items with scheduled frequencies can be identified by their scheduling code. For example, **BID, TID, QID, Weekly,** and so forth.

The schedule for a scheduled frequency is determined by each hospital. For example, if the order frequency is BID, the schedule markers are displayed twice each day at the standard hours determined by the hospital.

Note

*Schedules for both periodic and scheduled frequencies can be changed using the Set Schedule and Reset Schedule function.*

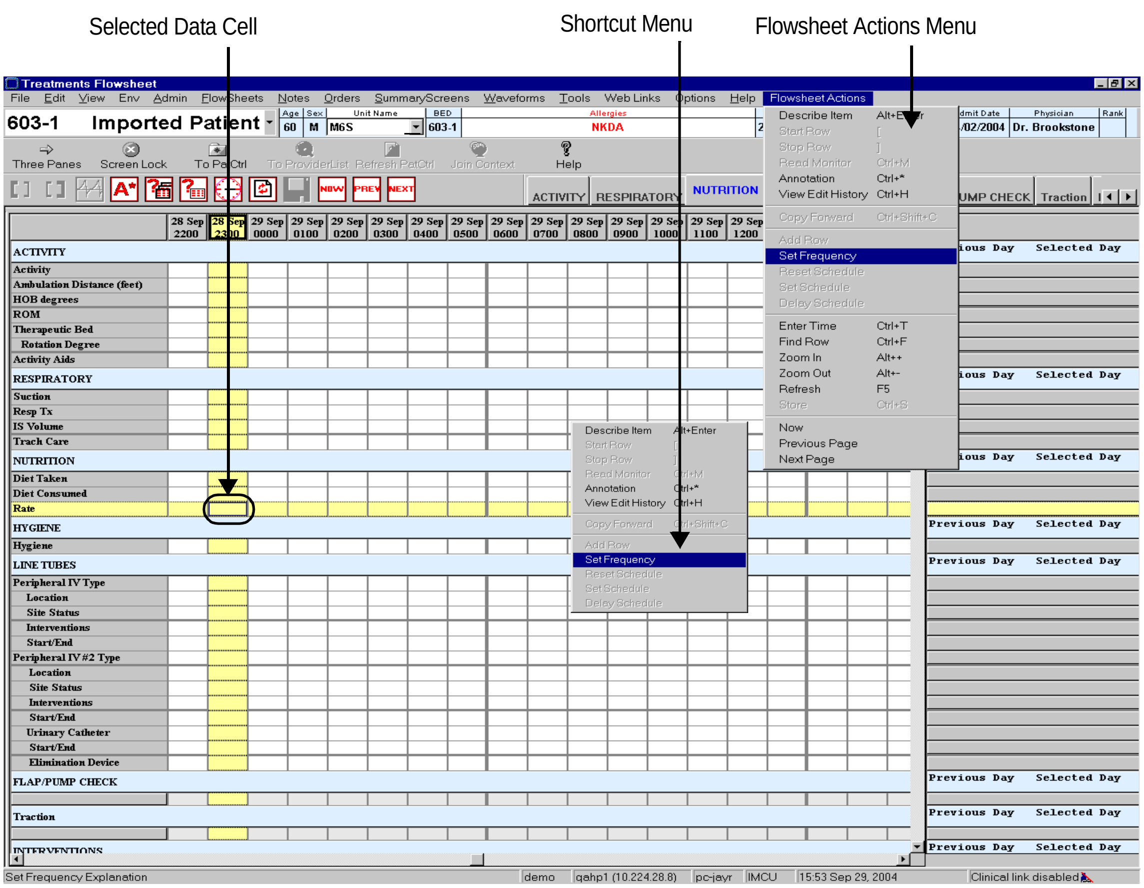
## Set Frequency

Use the **Set Frequency** function in a flowsheet to change the frequency of a treatment that is listed in an Ordered Item section.

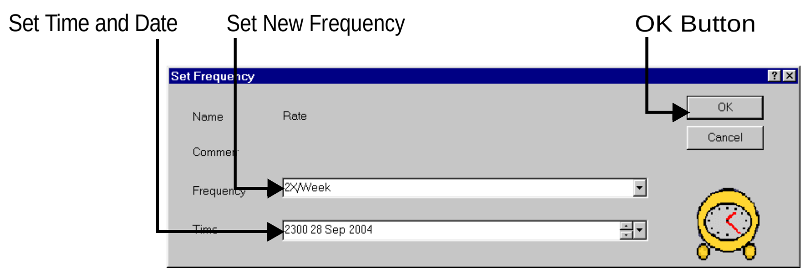
Note

> *Frequencies for medications can **not** be changed with the Set Frequency function in a flowsheet. To change a frequency for a medication, the order must be discontinued and a new order must be created.*

| Step by Step | Additional Information |
|---|---|
| 1. Select the data cell for the treatment frequency you would like to change. | |
| 2. Select **Set Frequency** from the **Flowsheet Actions** drop-down menu, *or. . .*right-click in the data cell and select **Set Frequency** from the **Shortcut** | The **Set Frequency** dialog box appears. |



| Step by Step | Additional Information |
| --- | --- |
| 3. Select a frequency from the **New Frequency** drop-down menu. | |
| 4. Select a time and date for the frequency from the **Time** field. | The default is the date and time of the data cell selected in Step 1. |
| 5. Click the **OK** button. | The frequency is changed for the treatment order. |



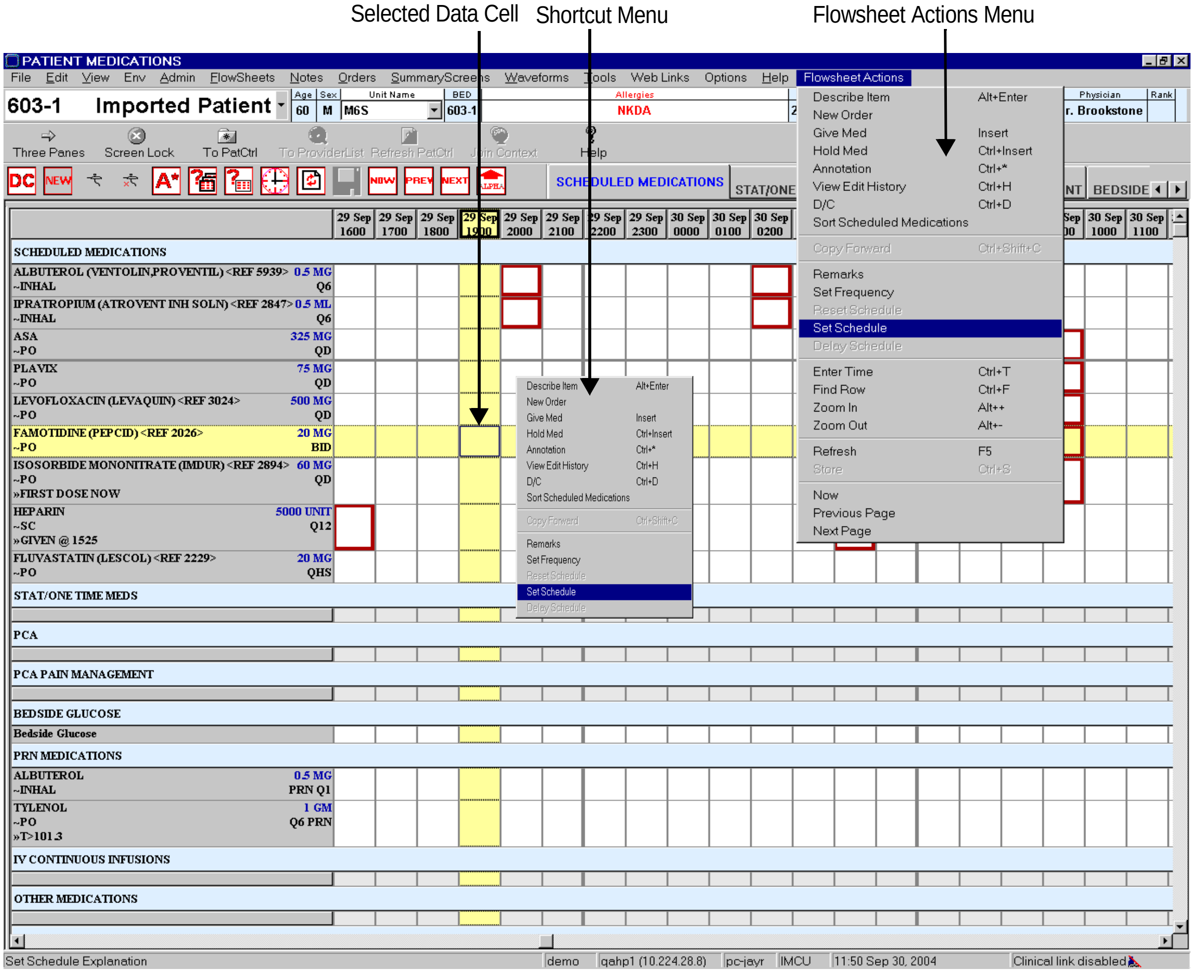
## Set Schedule

Use the **Set Schedule** function to override the pre-determined schedule for a Scheduled frequency, such as BID, TID, or QID.

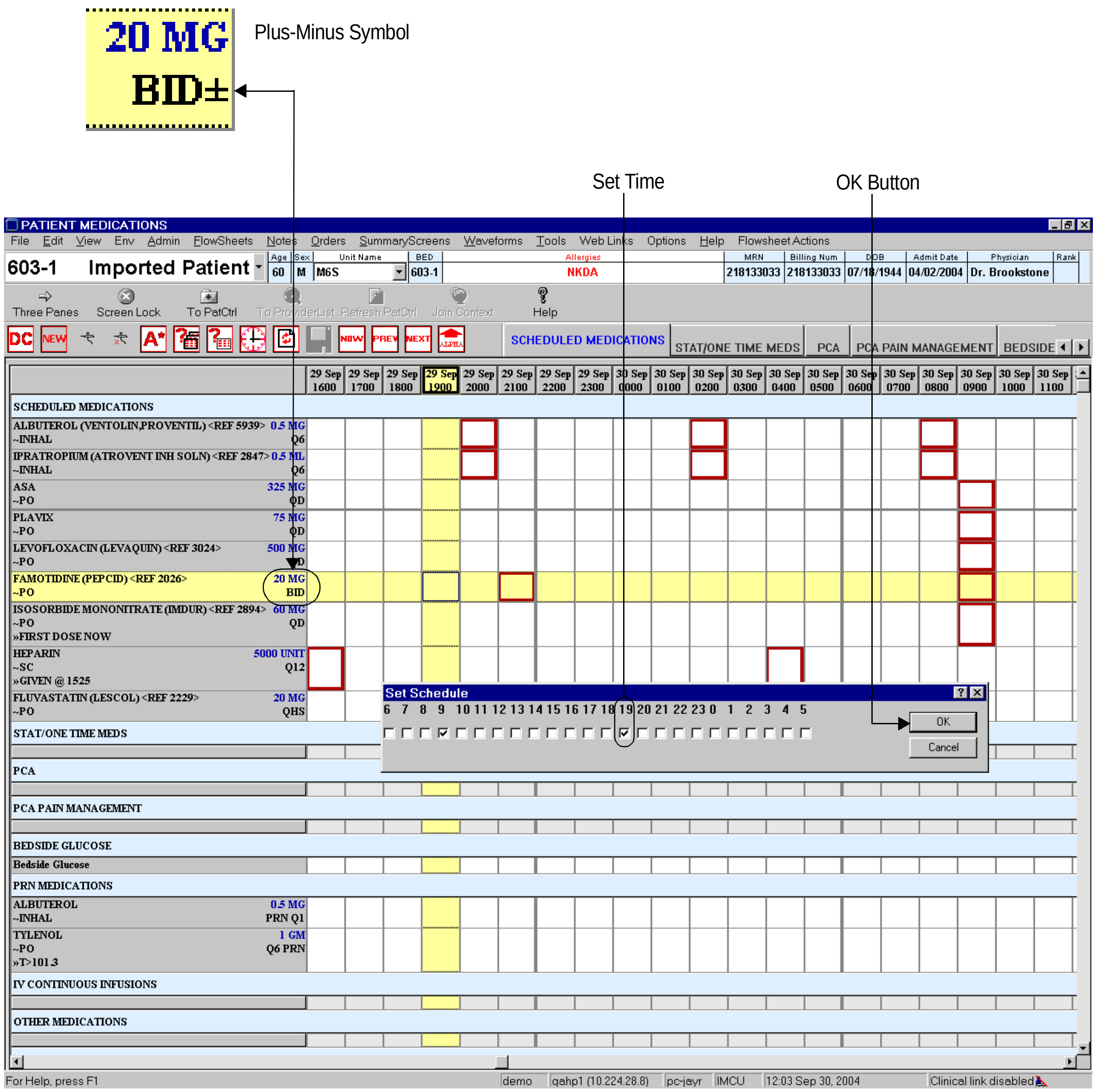
Schedule markers for scheduled frequencies are set automatically, according to the hours determined by the hospital. The **Set Schedule** function can change the pre-determined schedule markers to the time(s) the order will be delivered.

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell in the row of the order you are rescheduling. | |
| 2. Select **Set Schedule** from the **Flowsheet Actions** drop-down menu, *or. . .* right-click in the data cell and select **Set Schedule** from the **Shortcut Menu**. | The **Set Schedule** pop-up window appears. |

Selected Data Cell   Shortcut Menu   Flowsheet Actions Menu



| Step by Step | Additional Information |
|---|---|
| 3. Select the delivery times that correspond to the new schedule.<br>4. Click the **OK** button. | Click on a box once to add a check mark. Click on an existing check mark to remove the check mark.<br><br>The schedule markers are reset according to the new schedule. A plus-minus (±) symbol appears next to the frequency in the order description to show that the schedule has been changed. |

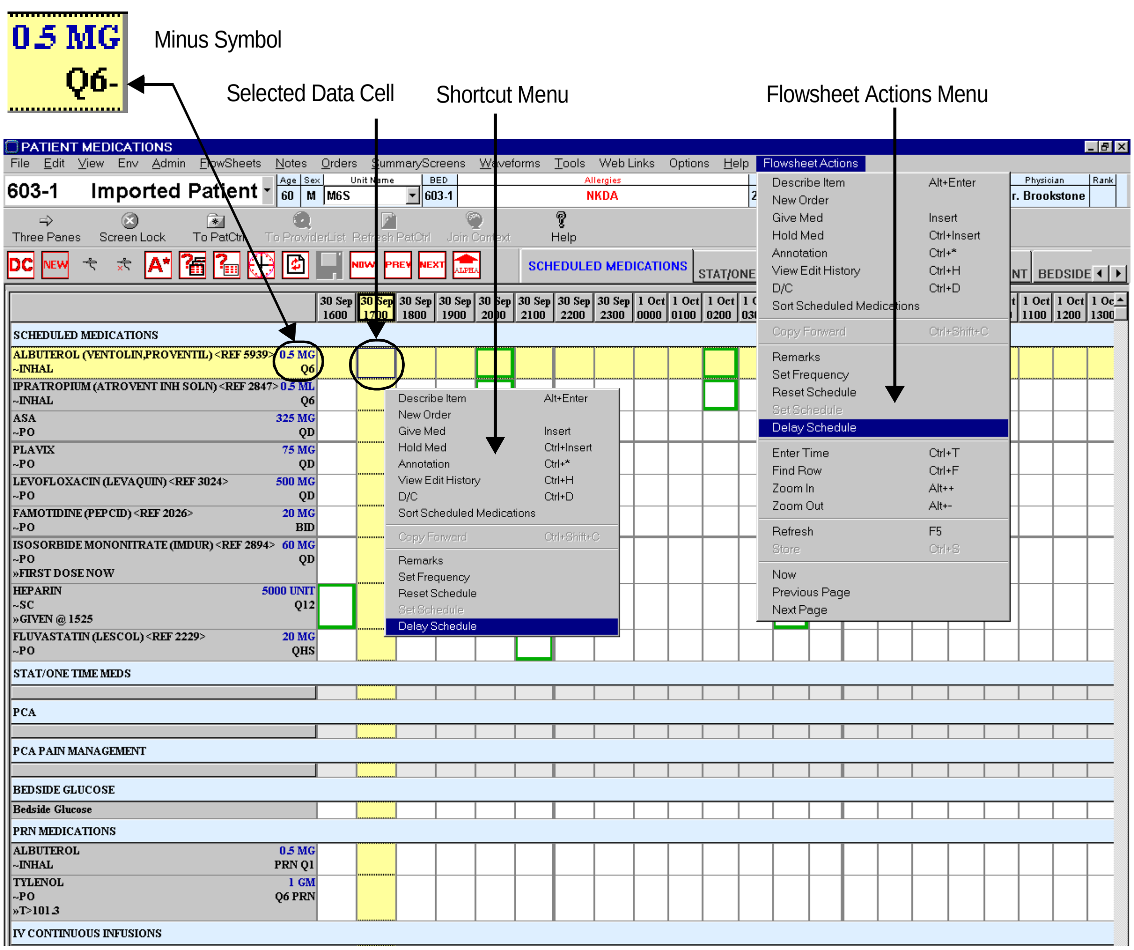


### Delay Schedule

Use the **Delay Schedule** function to delay a periodic time schedule, such as Q4 or Q6, in an ordered items section. Note that the **AutoDelay** and **ResetDelay** configuration options must be set to **Off**.

Schedule markers for Periodic frequencies are set automatically, according to the first time the order is delivered. The **Delay Schedule** function removes schedule markers from data cells when the delivery is delayed. A minus (-) symbol appears next to the frequency in the order description to show that the schedule has been changed.

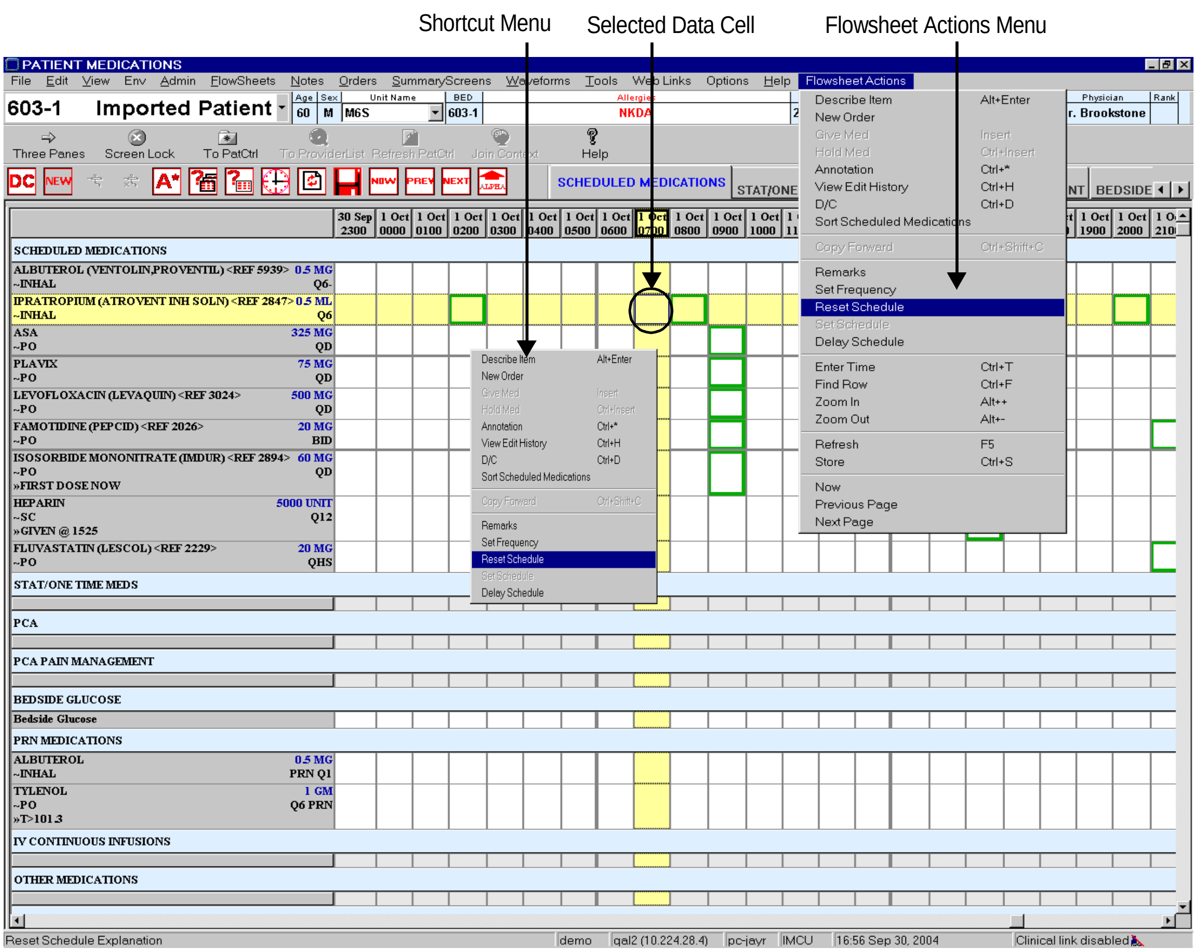
| Step by Step | Additional Information |
|---|---|
| 1. Select the data cell for the starting point of the new periodic schedule. | |
| 2. Select **Delay Schedule** from the **Flowsheet Actions** drop-down menu, *or. . .* right-click in the data cell and select **Delay Schedule** from the **Shortcut Menu**. | The selected data cell is marked as the new start time for the periodic schedule. All subsequent markers for the previous schedule are removed from the data cells. Refer to "Reset Schedule" on page 82 to change the periodic schedule to the new, delayed schedule. |



## Reset Schedule

Use the **Reset Schedule** function to reset a periodic time schedule, such as Q4 or Q6. Schedule markers for Periodic frequencies are set automatically, according to the first time the order is delivered. The **Reset Schedule** function can change the periodic schedule markers from a new starting point.

| Step by Step | Additional Information |
|---|---|
| 1. Select the data cell for the new starting point of the periodic schedule. | |
| 2. Select **Reset Schedule** from the **Flowsheet Actions** drop-down menu, *or. . .* right mouse click in the data cell and select **Reset Schedule** from the **Shortcut Menu**. | The periodic schedule markers are reset from the new starting point. The schedule markers in the previous time columns are not affected. |



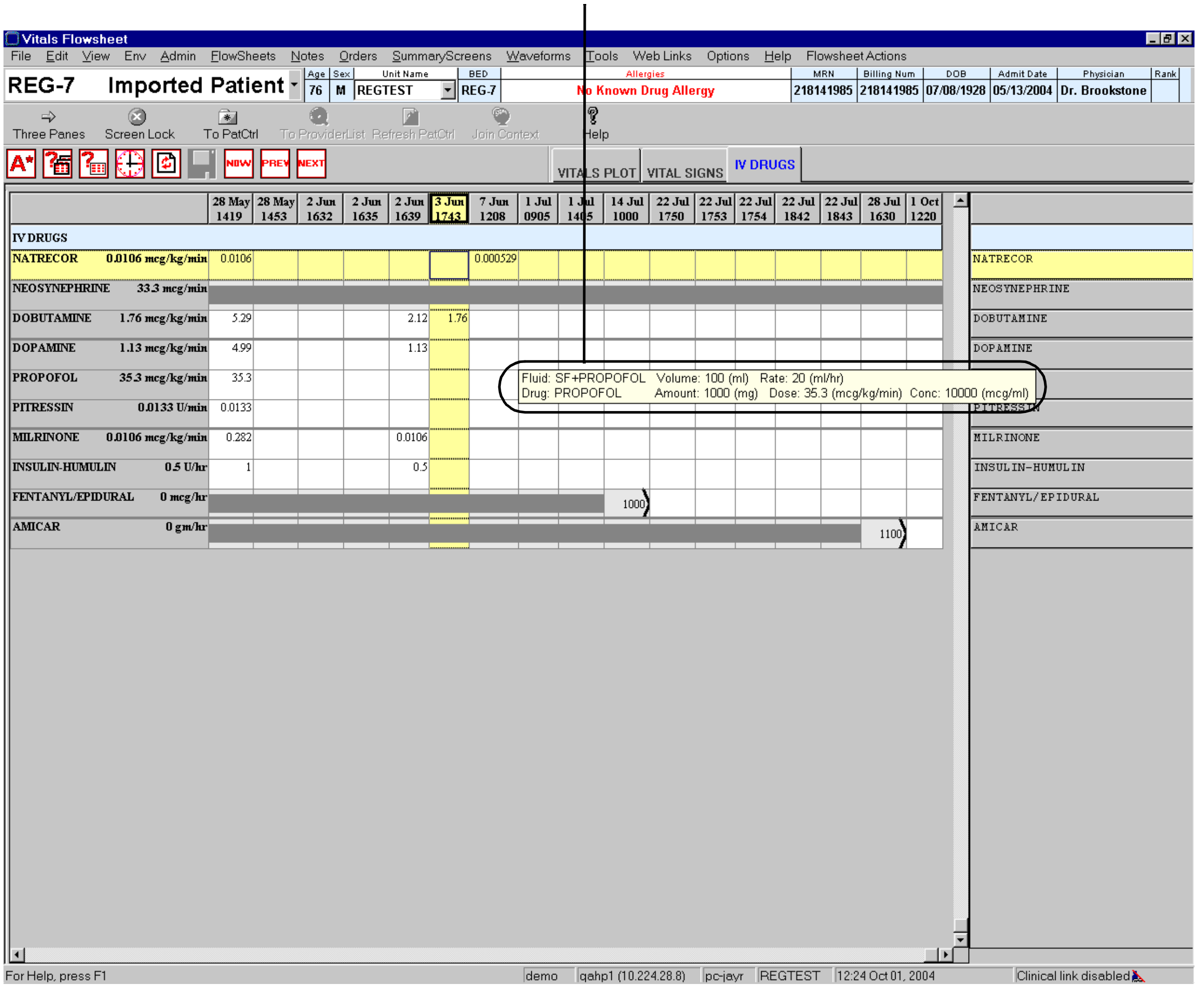
## Toggle Tooltip

Use the **Toggle Tooltip** feature to view the content summary of certain flowsheet sections. The following flowsheet sections are configured with the Toggle Tooltip feature:

- Weights section of the Vital signs flowsheet (displays Weight History)
- IV Drugs section of the Vital signs flowsheet (displays IV Drip info/calculations)
- Sections that are configured with Flags in the Lab Entry flowsheet (displays the Flag and the Normal Range).
- Large annotations display in a Tool Tip when there are only a few time columns on the flowsheet.

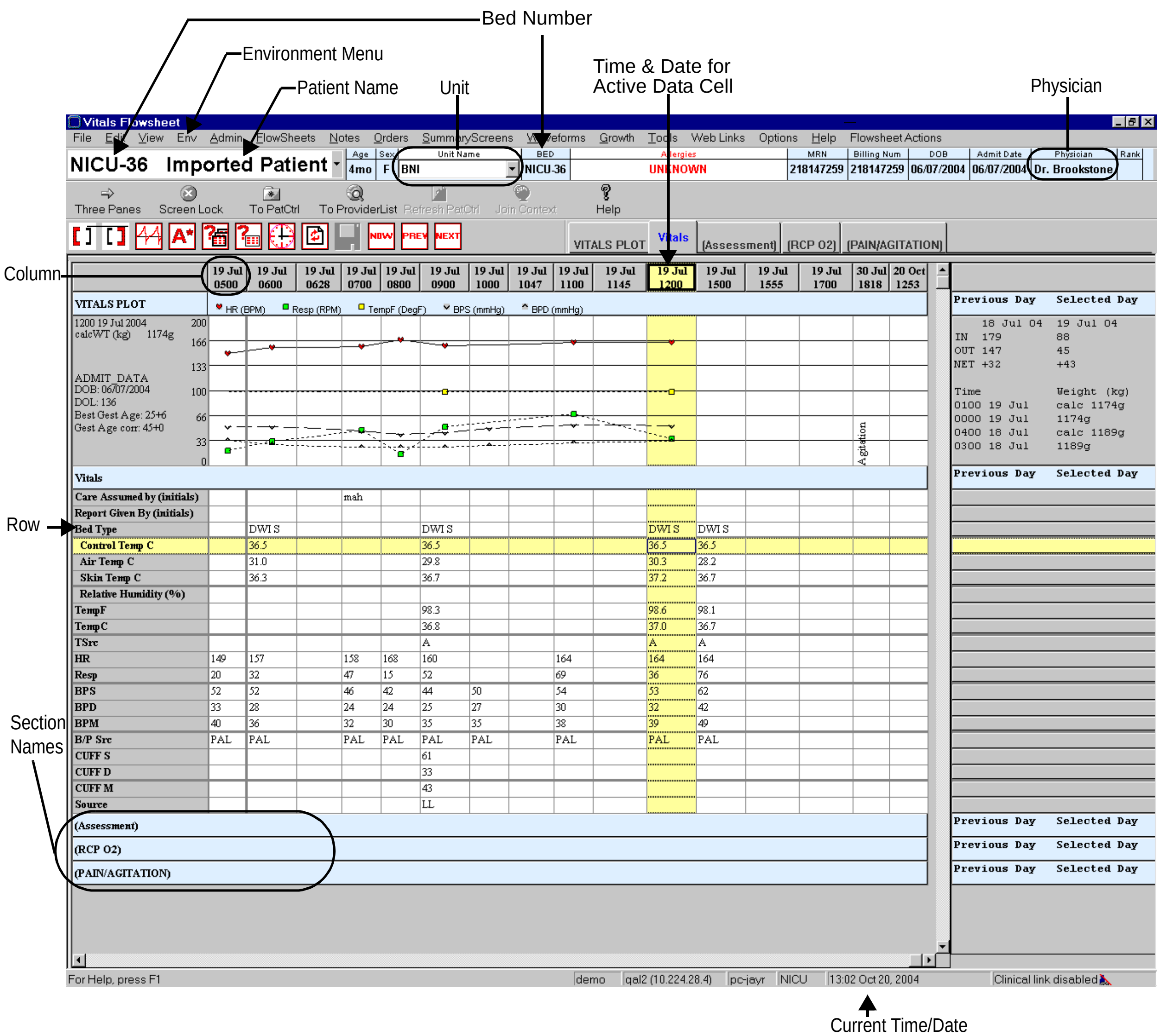
| Step by Step | Additional Information |
|---|---|
| 1. Place the cursor over a section that is configured with the **Toggle Tooltip** feature (do not click on the section). | The content summary displays in a pop-up box in approximately one-to-two seconds. |

Toggle Tooltip Display



# Flowsheet Specifics

This section describes individual flowsheets and their specialized features. For general information about flowsheets, refer to the **Flowsheet Basics** section beginning on page 53 in this manual.



## Specialized Flowsheets

All Essentris flowsheets are designed by each hospital to include one or more section types.

> Note
>
> *All Essentris flowsheets are configured to the requirements of each hospital and each environment within a hospital. Some flowsheet configurations are restricted by charting protocol.*

Some flowsheet sections are configured with specialized features that are unique to the flowsheet or section type. The most common flowsheets that are configured with specialized features are:

- Vitals Flowsheet
- Fluid Balance (I & O) Flowsheet
- Medications Flowsheet
- Lab Entry Flowsheet

## IV Drug Infusions

Sections relating to IV Drug Infusions typically appear on three flowsheets: I&O, Medications, and Vital Signs. The manner in which most IV Drug data is charted and the resulting display of that data differs among the flowsheets. Although, Vitals and Medications fowsheet IV Drug sections display the unit of dose or dose rate to the left of the first time column.

### The I&O Flowsheet

On the I&O flowsheet, the volume of an IV drug infused in a given time frame is entered on the appropriate flowsheet cell. For example, the shift total can be entered in the last column of the shift.

### The Medications Flowsheet

The Medications flowsheet automatically displays the dose based upon the volumes charted on the I&O flowsheet. These computed values are read-only.

### The Vitals Flowsheet

The Vital Signs flowsheet can chart the dosage being delivered as often as once per minute. The user can enter the rate, and the resulting dosage is computed and displayed in the cell. For example, to compute the dosage for a bottle of Nitroglycerin 50mg in D5W 250cc, enter the number **10** to specify a rate of 10 cc/hr. The Vitals Flowsheet displays 33 mcg/min.

Alternatively, you can directly chart the dosage, and the resulting rate is computed. For example, the order is to infuse Dopamine 5 mcg/kg/min. Enter uppercase **D**, the number **5**, and Store the entry. The Toggle Tooltip displays the correct rate to infuse.

# Vitals Flowsheet

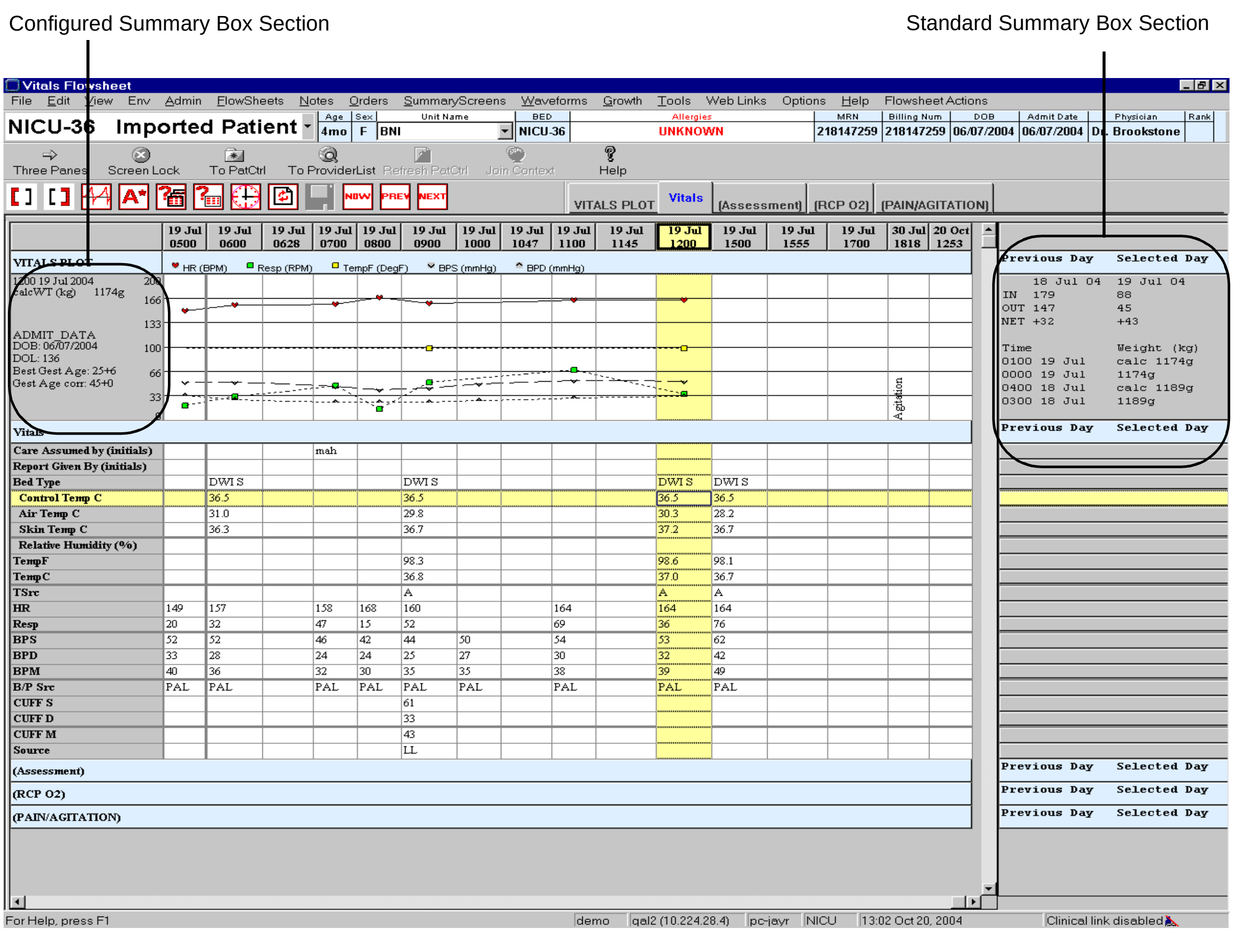
Use the Vitals Flowsheet to track vital signs and critical patient data. The Vitals flowsheet contains the following specialized features:

- Summary box sections
- Plot section - the number of rows in the plot section can be configured; the default is five.
- IV Fluids section(s)

## Summary Box Sections

There are two summary box sections in the Vitals Flowsheet. The summary box in the upper left corner of the Vitals Flowsheet is configurable and displays patient data that is imported from another flowsheet or an ADT note. For example, the summary box could display Admission Data from the Admission Note. The data items displayed in the summary box are selected by each facility.

The summary box in the upper right corner of the Vitals Flowsheet is standard and displays daily summaries of Intake and Output fluids and the weight history for the selected patient (imported from the Intake & Output flowsheet). The data items displayed in this summary box are standard and cannot be configured.



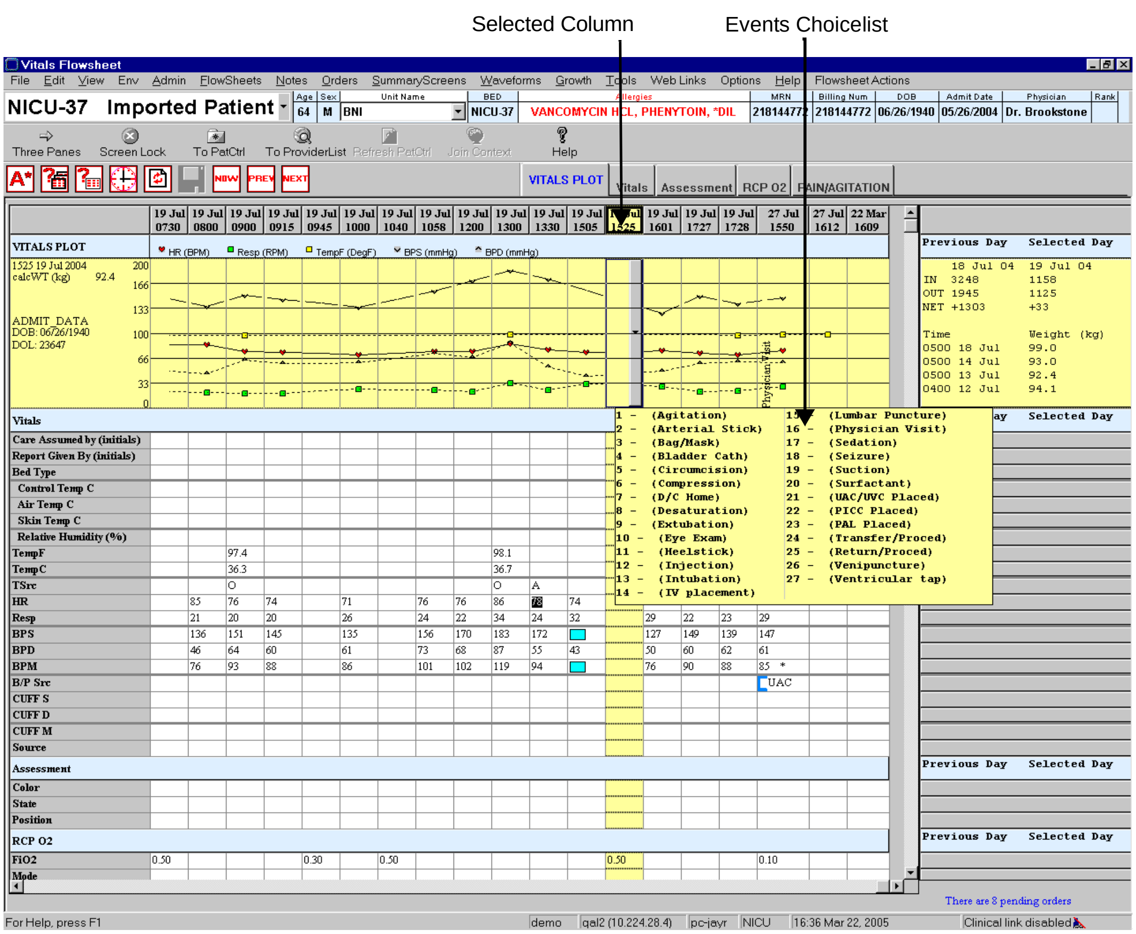
## Vital Signs Plot Section

Use the Vital Signs Plot section to track preconfigured vital signs such as Temperature, Heart Rate, and Blood Pressure. As data is entered for the items in the standard sections of the flowsheet, the plot section displays a real-time graph. The Plot section displays the statistics as well as data trends in the same flowsheet page. The Plot section can also chart significant events.

## Chart Event

Use the Events feature to chart events in the plot section to display additional information about time-sensitive events or changes in data trends.

| Step by Step | Additional Information |
|---|---|
| 1. Select a column in the Vital Signs Plot section. | The selected column is highlighted and a drop-down choicelist or a free-text box is displayed, depending on the configuration. |
| 2. Select an event from the choicelist, *or* type the event in the column. | The event is displayed vertically in the column. |



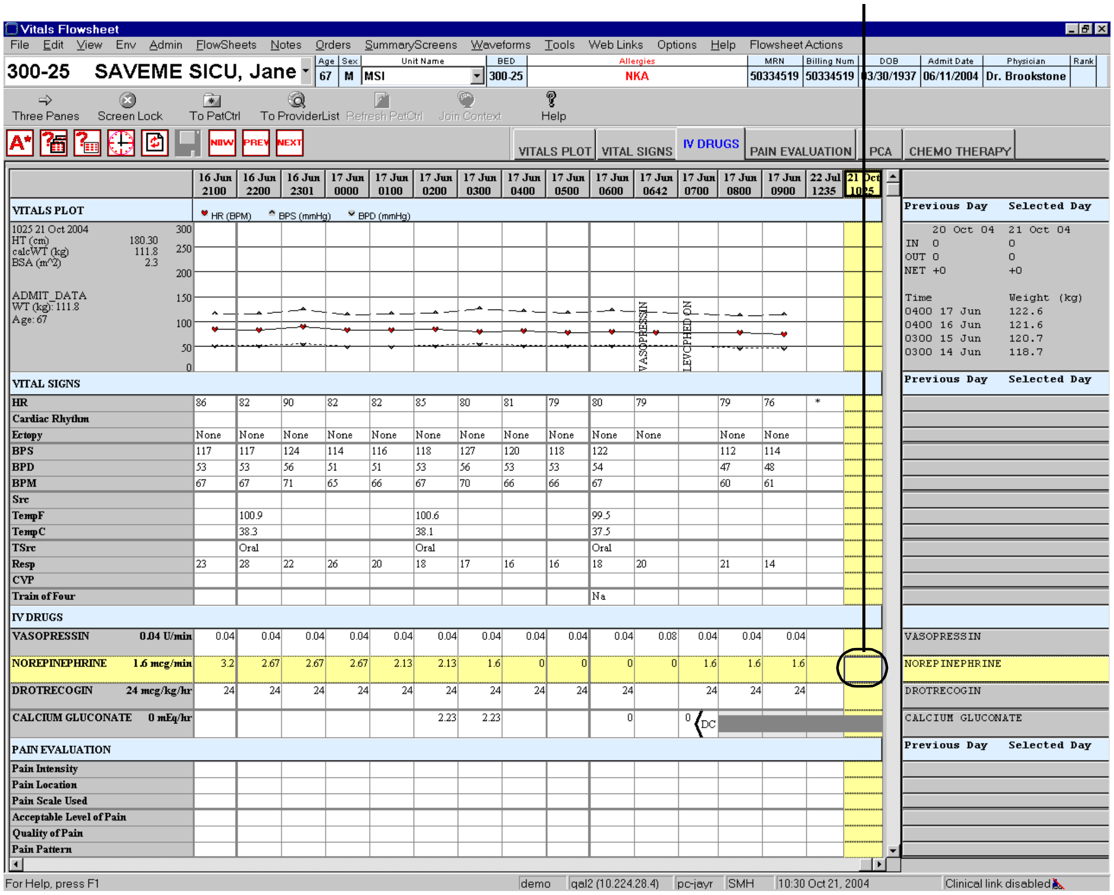
## Chart IV Drug Infusion Dosages

The Vitals Flowsheet can be configured with an IV Drug Infusion section. Use the IV Drug Infusion section on a Vitals Flowsheet to chart and calculate drug dosages for IV meds or fluids as often as necessary, up to once per minute.

When a new rate is entered in an IV Drug Infusion time column, the dosage is automatically calculated and displayed. Similarly, the dosage can be charted directly. To compute the dosage for weight dependant IV Drugs, the patient's calculated weight must be on the I&O Flowsheet.

| Step by Step | Additional Information |
| --- | --- |
| 1. Select a data cell in the IV Drug Infusion section. | Use the Toggle Tooltip function, described on page 83, for a complete description of the IV Drug Infusion. |
| 2. Type the new rate in the data cell and press **Enter,** or . . .<br>enter **D** followed by the new dosage and press **Enter** or move the cursor to a different cell. | The new dosage is calculated and displayed in the selected cell.<br>The **D** disappears and the new dosage is displayed in the selected cell. |

Selected Data Cell



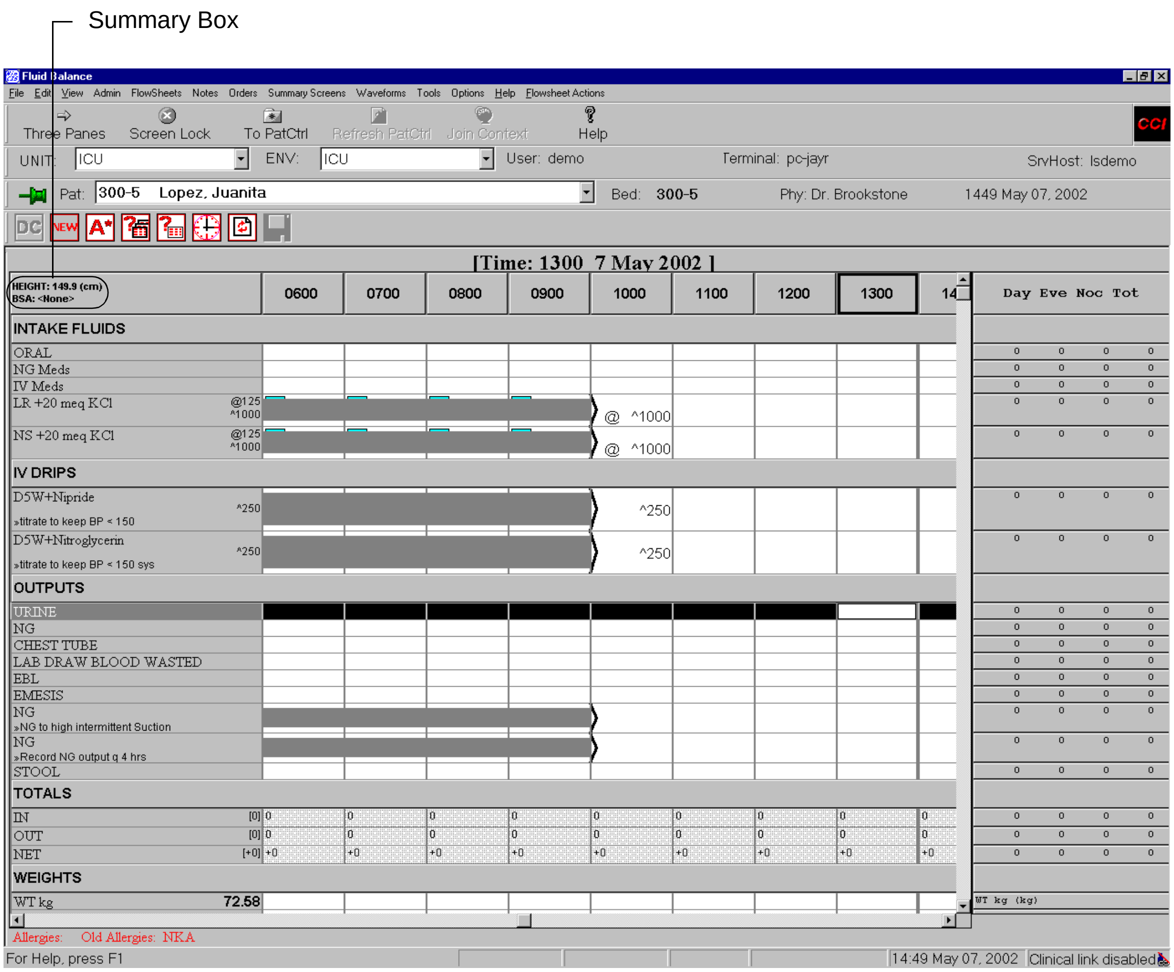
## Fluid Balance (I&O) Flowsheet

Use the Fluid Balance (or Intake and Output) flowsheet to chart fluid intake and output values. Intake and output totals are automatically calculated to show fluid balance for patients. The Fluid Balance flowsheet contains the following specialized features:

- Summary Box
- Daily Summaries Section
- Totals Section
- Weights Section
- Intake and Outputs Sections

### Summary Box

The Fluid Balance flowsheet can be configured with a summary box to display patient information that is imported from another flowsheet or a note. The summary box is usually configured to import admission data that relates to fluid balance.



## Daily Summaries Section

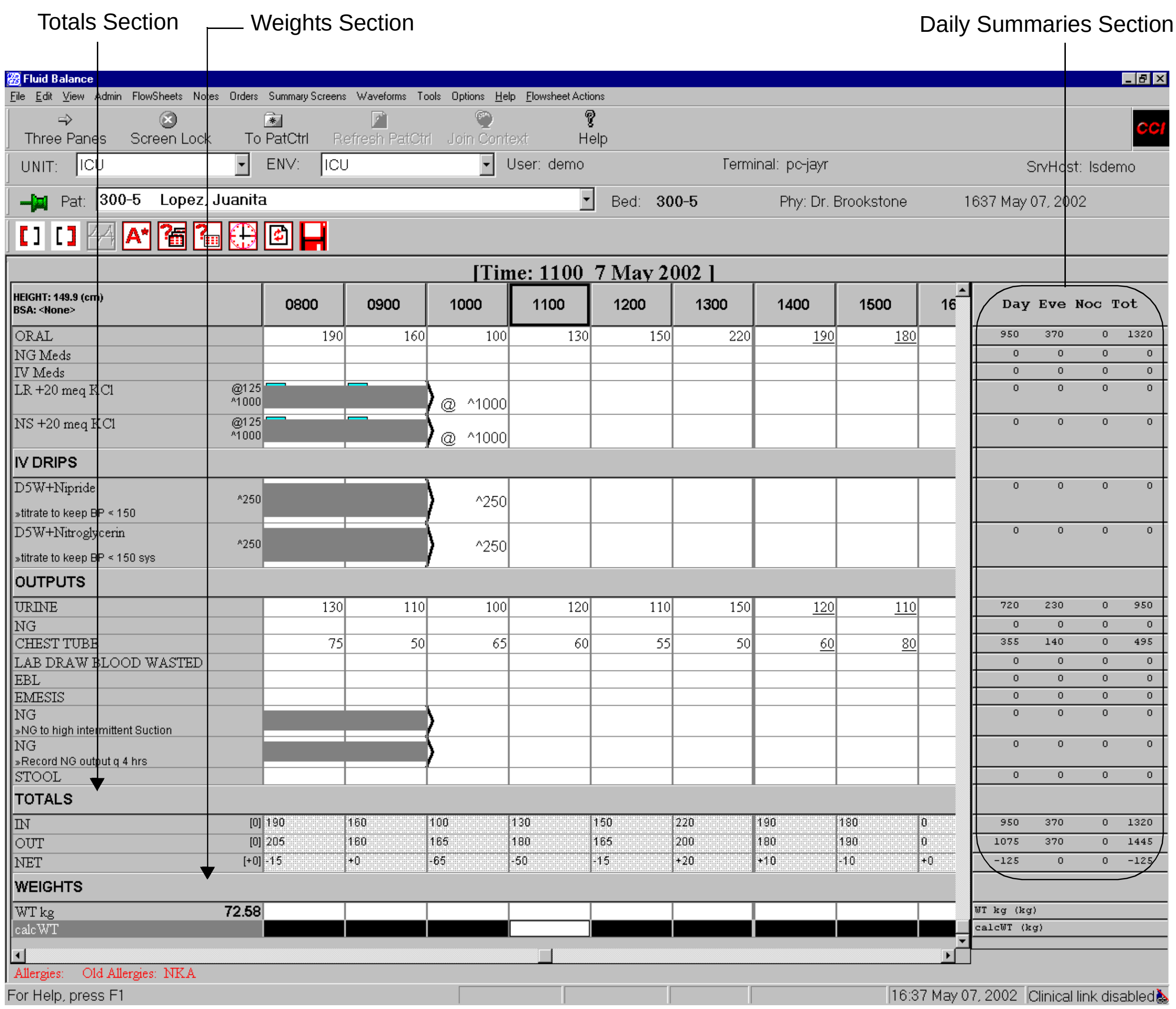
The Daily Summaries section displays a summary of the intake and output values for each database item by shift (Day, Eve, Noc) and the combined value for the 24-hour day (Tot).

## Totals Section

The Totals section displays the fluid balance for a patient. A built-in formula calculates the total intake (IN) and output (OUT) values and displays the net gain or loss (NET). The Totals section calculates the fluid balance for each time column that contains intake and/or output values.

## Weights Section

The Weights section charts patient weight information, including the actual weight (WTkg), the calculated weight that determines medication dosage (calcWT), and the weight converted to pounds (Weight lbs).



## Intake and Outputs Sections

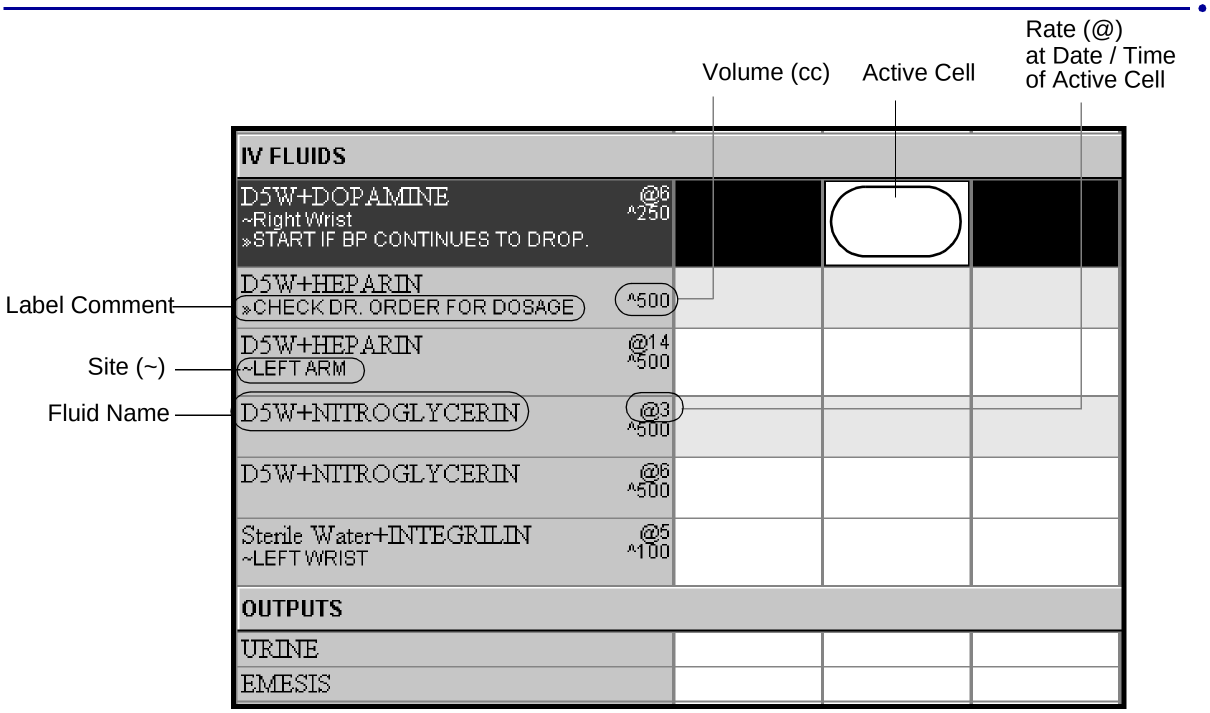
The Intake and Output sections chart intake and output values for patients. The intake and output sections can be configured with subsections to further organize fluids. For example, the Intake section can be configured with Intake Fluids and IV Drips subsections.

Intake and output fluids are sorted into categories within the sections of the flowsheet. The categories that are commonly used are: Output, IV, Drug, TPN, Meds, Oral, NG, Crystalloid, Colloid, Blood, Urine, NG, Output, Chest Tube Output, Blood Outputs, and Irrigations. As fluids are assigned, they are sorted and placed in the flowsheet using the criteria in the order specified below.

1. By Fluid—Intake or Output
2. By Fluid Category
3. By Fluid Name in alphabetical order
4. By the Order of Time Assigned

Intake Flowsheet rows typically display the following information:

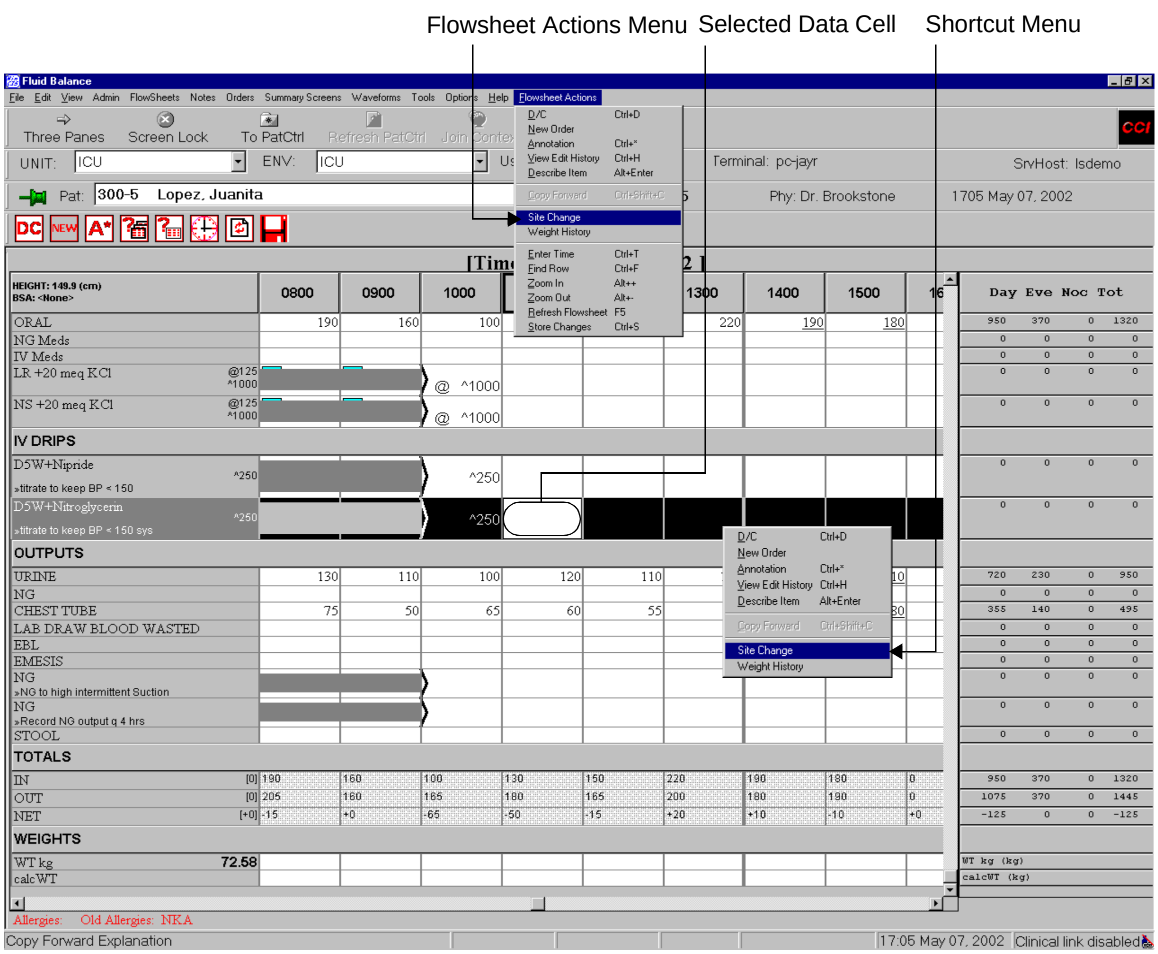
- Name
- Site
- Label Comment
- Rate at Date / Time of Active Cell
- Volume (in cc)



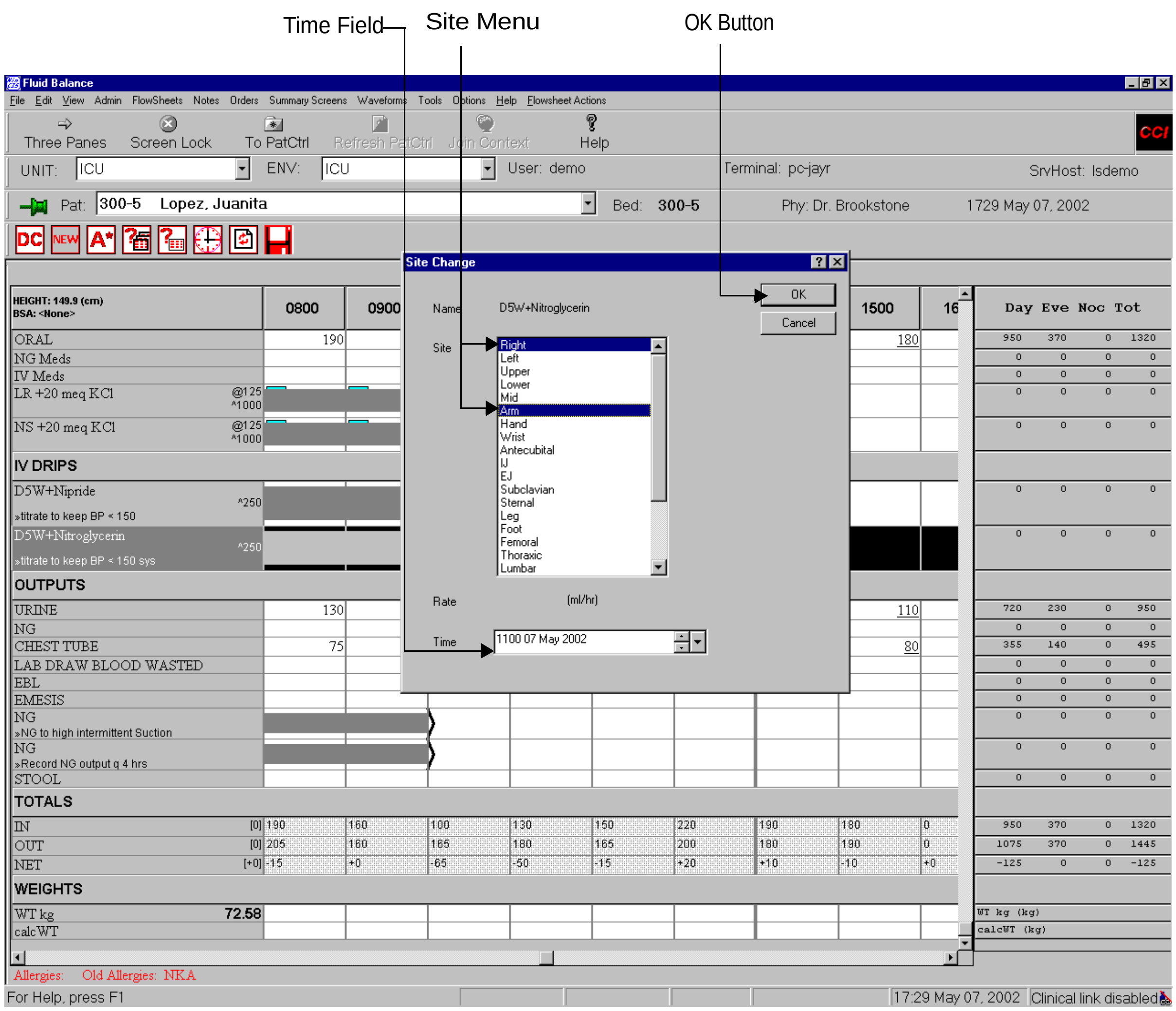
## Change Site of Fluid

The Site Change function is used to record a site change for an IV fluid.

| Step by Step | Additional Information |
|---|---|
| 1. Select the appropriate data cell in the Fluid Balance flowsheet. | |
| 2. Click **Flowsheet Actions** on the Menu Bar and select **Site Change** from the drop-down menu.<br>**- or -**<br>Right mouse click in the data cell and select **Site Change** from the **Shortcut Menu**.<br>**- or -**<br>Type the **Tilde (~)** symbol and press **Enter**. | The Site Change menu is displayed. |



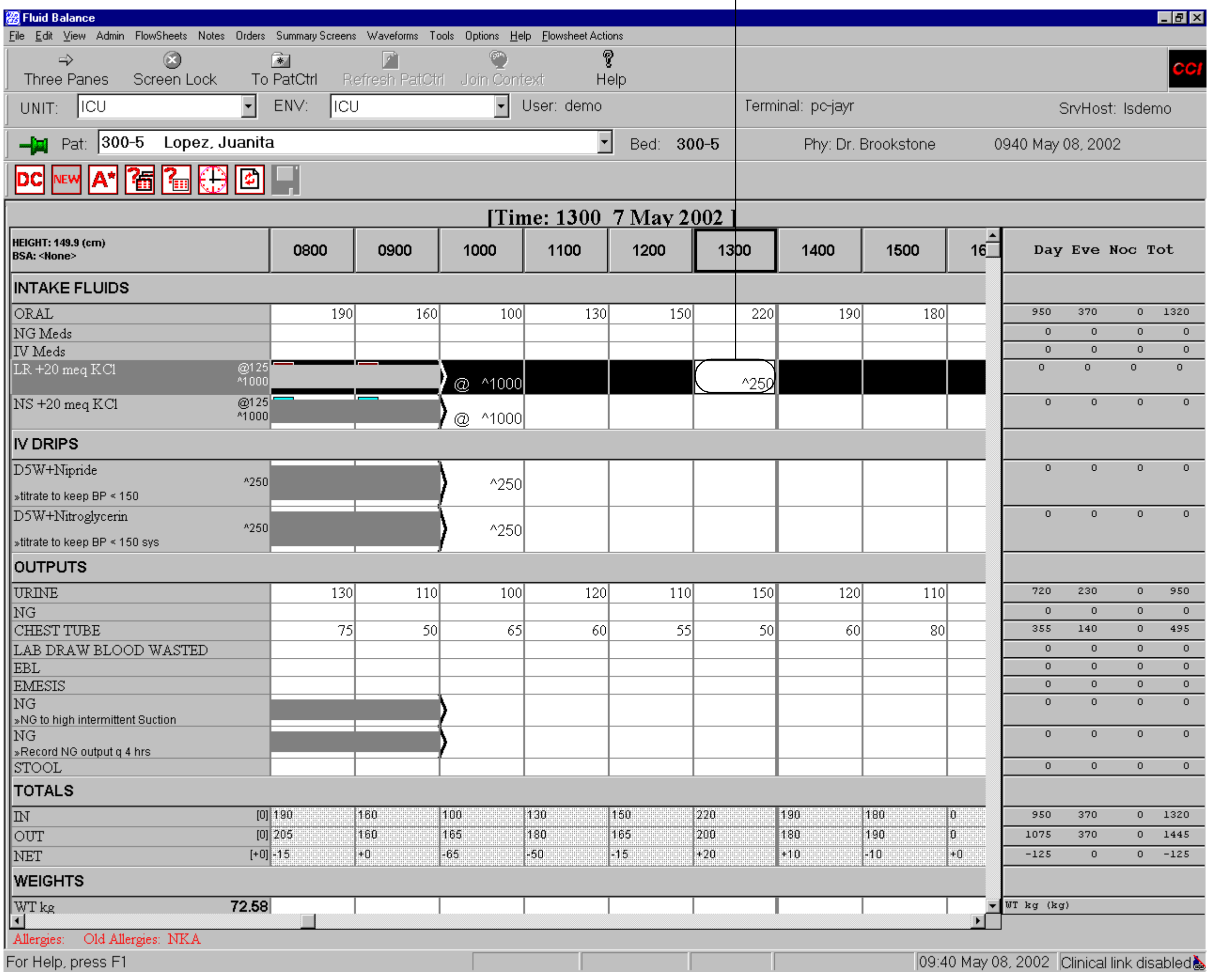
| Step by Step | Additional Information |
|---|---|
| 3. Select the new IV site from the Site menu. | Click once to select a site and again to cancel the selection. |
| 4. Select a time and date for the site change from the Time field. | The default time is the time and date for the data cell in Step 1. |
| 5. Click the **OK** button. | |



## Hang New Fluid

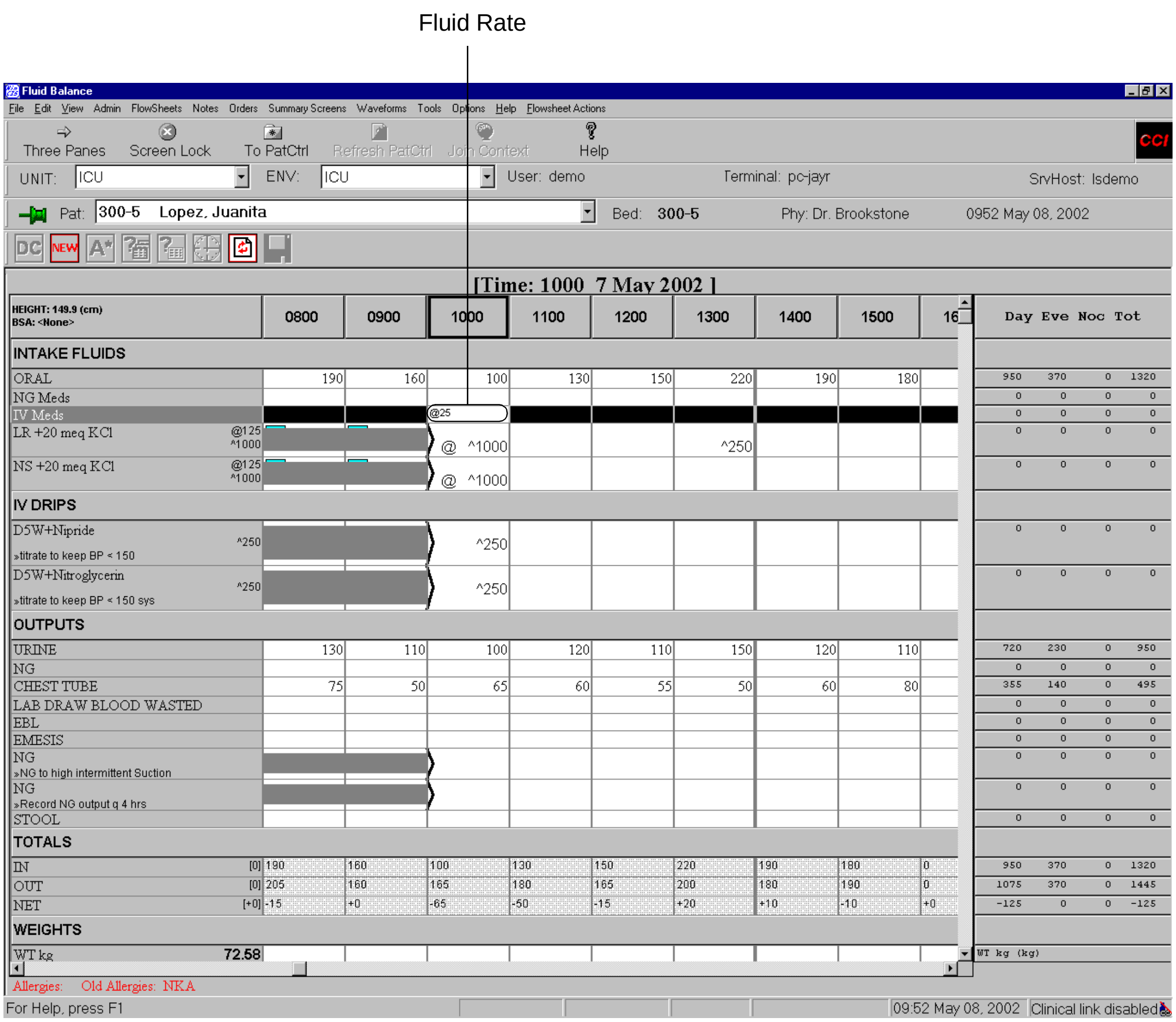
| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell in the Intake section of the Fluid Balance flowsheet.<br>2. Type a **Caret (^)** symbol and the amount of fluid in cc units. | The Hang New Fluid function applies only to IV orders in the Fluid Balance flowsheet. |

Hang New Fluid



## Change Fluid Rate

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell in the Intake section of the Fluid Balance flowsheet. | The Fluid Rate function applies only to IV orders in the Fluid Balance flowsheet. |
| 2. Type the **At (@)** symbol followed by the new fluid rate in ml/hr. | |

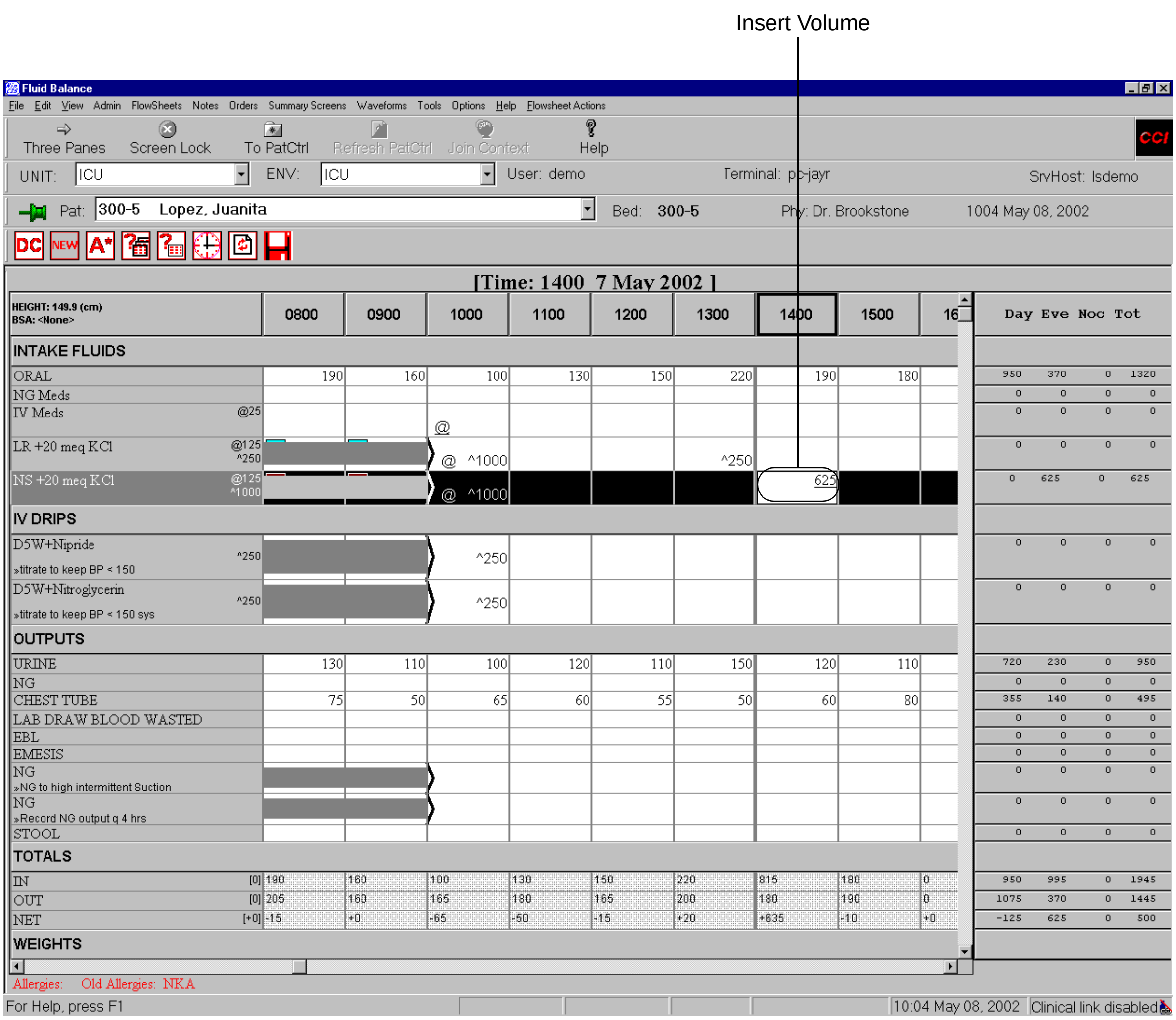


## Insert Volume Key

Use the Insert Volume key to calculate the total fluid delivery since the last time fluid delivery was charted. The system calculates the total based on the fluid order and the rate changes since the last charted delivery.

> Note
>
> *The cursor must be in a whole-hour time column, such as 0800, 0900, 1000, . . .*

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell in an even numbered hour date/time column for a fluid. | |
| 2. Press the **Insert** key. | The total fluid delivery is automatically calculated based on the fluid order and the rate changes since the last charted delivery. |

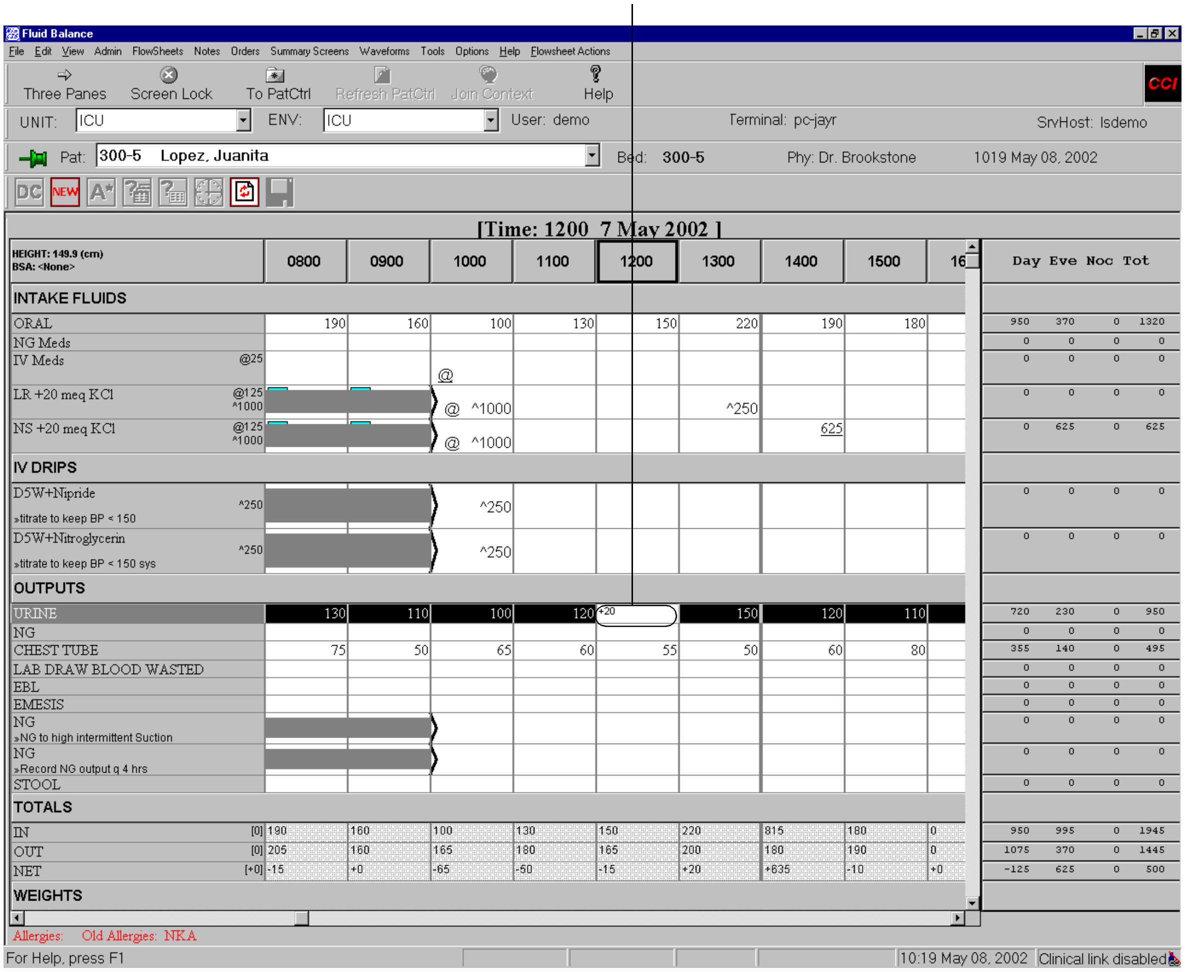


## Chart Incremental Increases of Outputs

Use the Incremental Increase function to increase an output volume on the Fluid Balance flowsheet.

| Step by Step | Additional Information |
|---|---|
| 1. Select the data cell that contains the output volume requiring modification.<br>2. Type a **Plus (+)** sign followed by the increase-in-output value.<br>3. Press **Enter**. | The Incremental Increase function applies only to the Outputs section of the Fluid Balance flowsheet.<br><br>The increase in output value is added to the original output value, and the sum is displayed. |

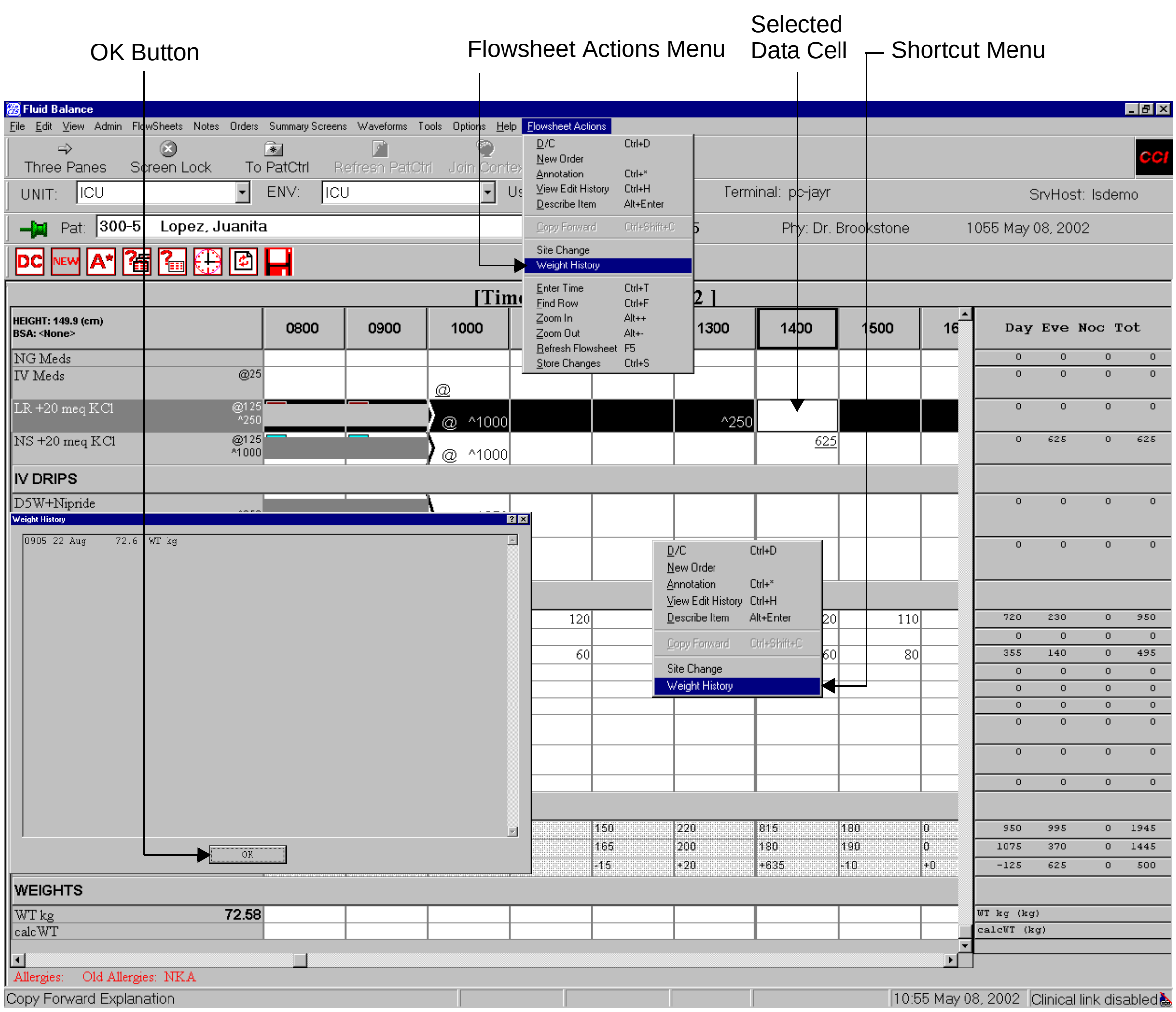
Incremental Increase



## View Weight History

Use the **Weight History** function to view a patient's weight history.

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell in the Intake or Outputs section of the Fluid Balance flowsheet. | |
| 2. Click **Flowsheet Actions** on the Menu Bar and select **Weight History** from the drop-down menu.<br>**- or -**<br>Right mouse click in the data cell and select **Weight History** from the **Shortcut Menu**. | The **Weight History** summary box is displayed. |
| 3. Click the **OK** button to close the **Weight History** summary box. | |

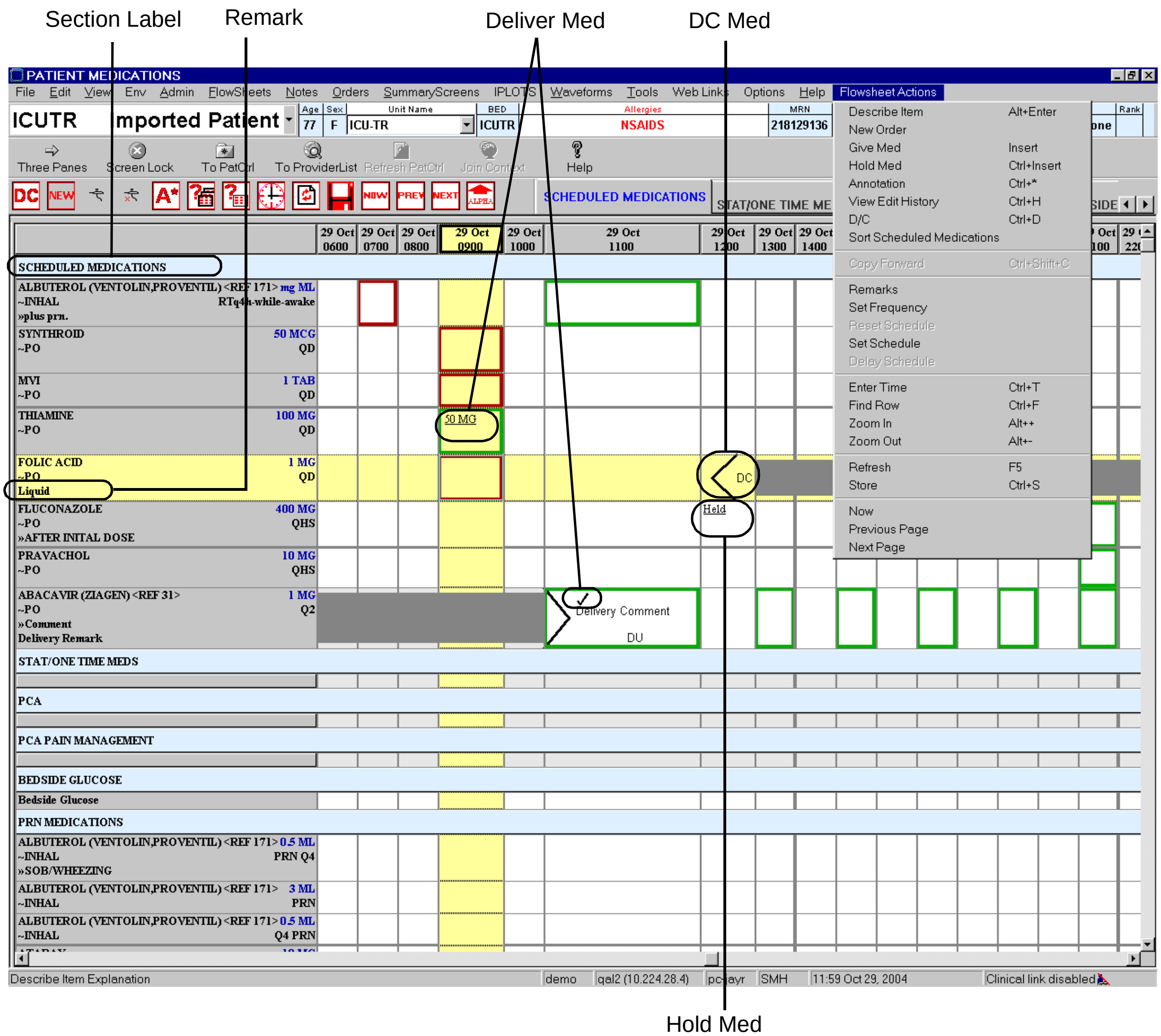


## Medications Flowsheet

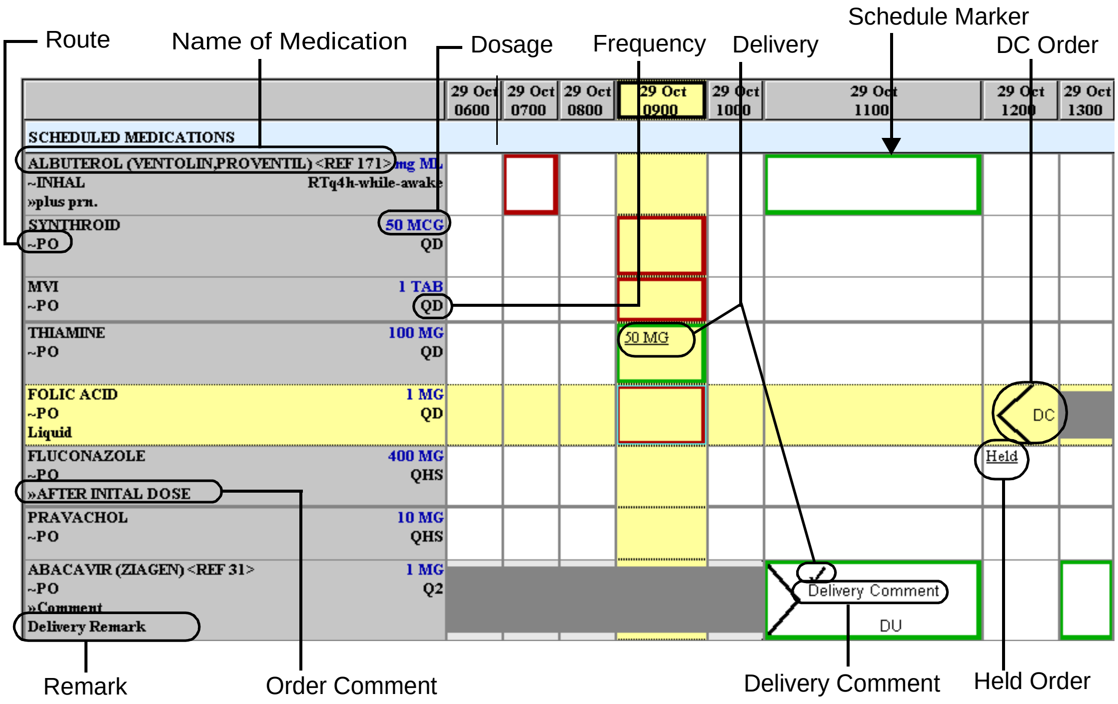
Use the Medications flowsheet to chart medication orders. Orders can be delivered, discontinued, held, or rescheduled on the Medications flowsheet. Remarks can also be created to note important information about a medication order.

The Medications flowsheet is divided into sections that are configurable to the requirements of each hospital. Sections of medication orders can be configured in the following two ways:

1. According to medication Schedule
   For example: PRN, Scheduled, STAT
2. According to medication Type
   For example: Antibiotics, IV Fluids, Pain Medications



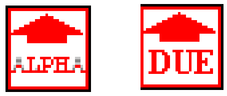
Medication rows can display the following information:




- Name of medication
- Route
- Dosage
- Frequency
- Schedule Markers
- Order Comment - This comment originates in the Order Editor and is a permanent part of the order. It cannot be altered.
- Remarks - This feature is described in "Medication Remarks" on page 106.
- Deliveries - This feature is described in "Deliver Medication" on page 103.
- Delivery Comment - A comment can be placed in the data cell for the delivered medication. Select the data cell and enter the comment. Comments must be begin with an alpha character. The comment appears on the second line of the data cell, under the dose line.
- Discontinued (DC) orders - This feature is described in "Discontinue Medication" on page 105.
- Held Orders - This feature is described in "Hold Medication Delivery" on page 104.

### Sorting Scheduled Medications

An optional icon can be used in Medications flowsheets to sort medication orders by the most overdue or in alphabetical order. The icon appears only when the cursor is in a medications section and the section is labelled **Scheduled Medications**. The icon is disabled when a new time column is added that is not hourly.




The icon label toggles between **Due** and **Alpha** depending on the state of the Medication flowsheet.

When the flowsheet is opened, the default sort is by most-overdue medications and the icon is labeled **Alpha**. If the scheduled medication is X1 and has not been given and does not display the scheduled marker, or the schedule box is red (meaning overdue) it is listed first. Note that the flowsheet can be configured to *not* have a Stat section. All Stat markers then display first in the Medications flowsheet.

Click the **Alpha** icon to sort and display the medication orders in alphabetic order.

Overdue medications are sorted by the schedule markers on the current page, regardless of the marker color. Also, when **Give Med**, **Hold Med**, or an annotation is given within the due time, medications are sorted starting with the next schedule marker. Schedule markers are displayed in red for medications that are more than an hour overdue. Contact CliniComp Client Services to activate this feature.

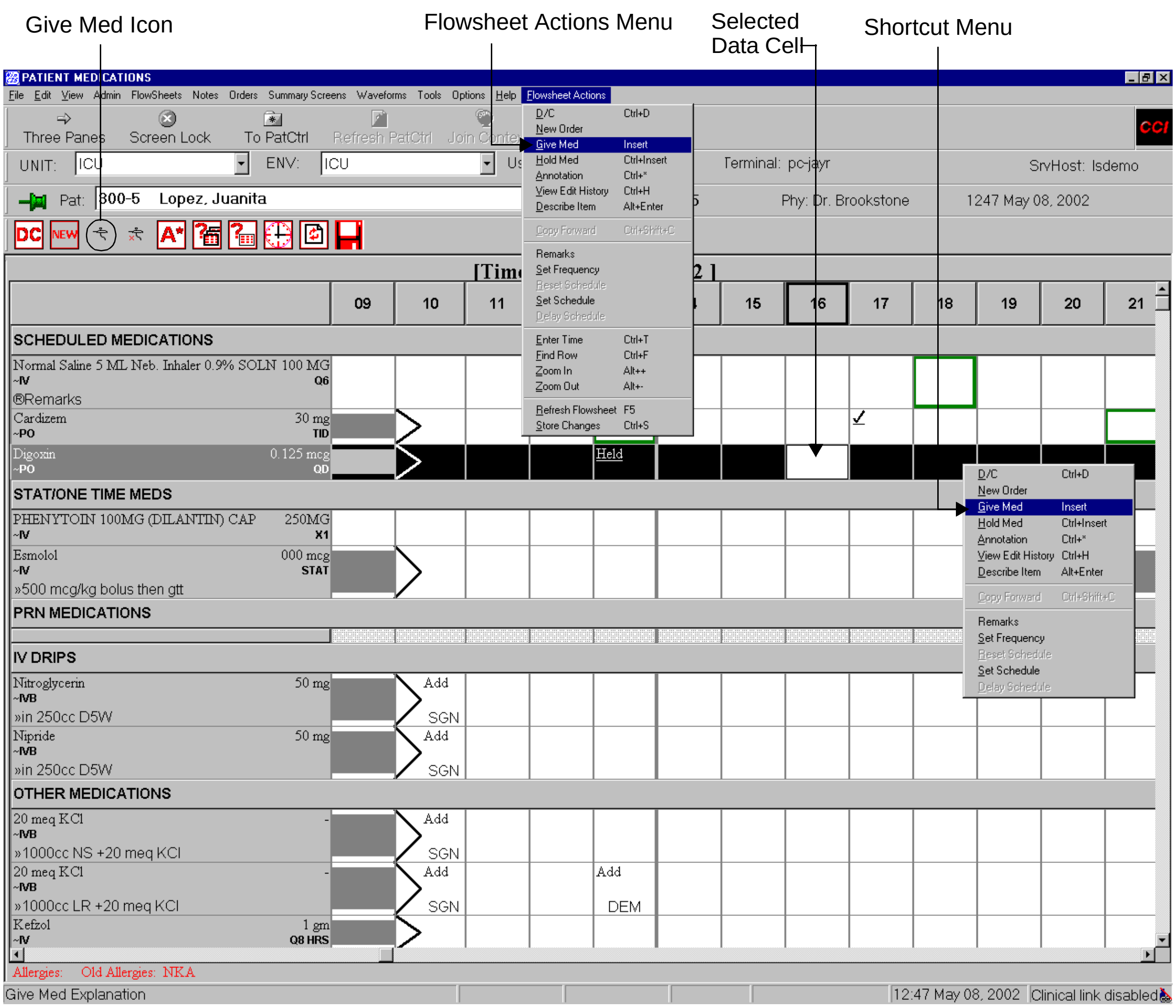
### New Order

A new order can be initiated from the **Flowsheet Actions** menu, the **New** icon on the Icon bar, or from the shortcut menu. Refer to "Order Editor from a Flowsheet" on page 198 for detailed instructions.

## Deliver Medication

Use the following steps to chart a patient's medication delivery.

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell for the medication delivery. | |
| 2. Select **Give Med** from the **Flowsheet Actions** drop-down menu on the Menu Bar or. . .<br>right mouse click in the data cell and select **Give Med** from the **Shortcut Menu** or. . .<br>click on the **Give Med** icon *or. . .*<br>press the **Insert** key on the keyboard *or. .*<br>enter a comment in the selected data cell. | A delivery marker is displayed in the selected data cell. A delivery marker is displayed as either a check mark or the dose delivered (a configured option).<br>Also, the dose ordered can be keyed-in. The check mark (if configured) appears when the keyed-in dose matches the ordered dose, including character spacing and case. |

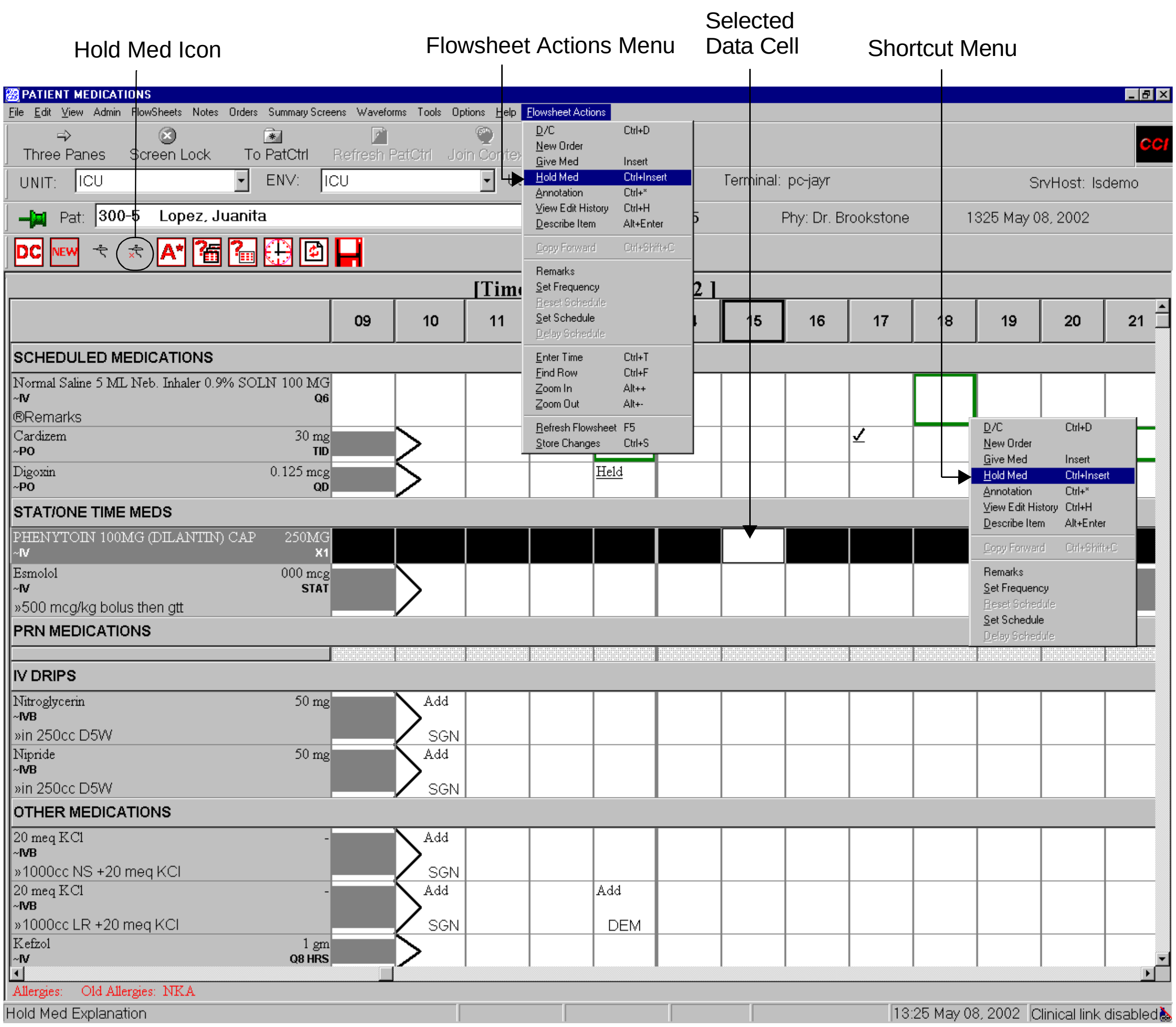


**The Check-Mark Option** - When the check mark is displayed, it specifies that the medication dose delivered is the dose amount ordered. To deliver a different dose than ordered, select the data cell where the dose is to appear and key-in the new amount, beginning with the numerical value of the dose followed by the unit of measure, such as **20 MG**.

## Hold Medication Delivery

Use the following steps to place a hold order on a medication delivery to a patient:

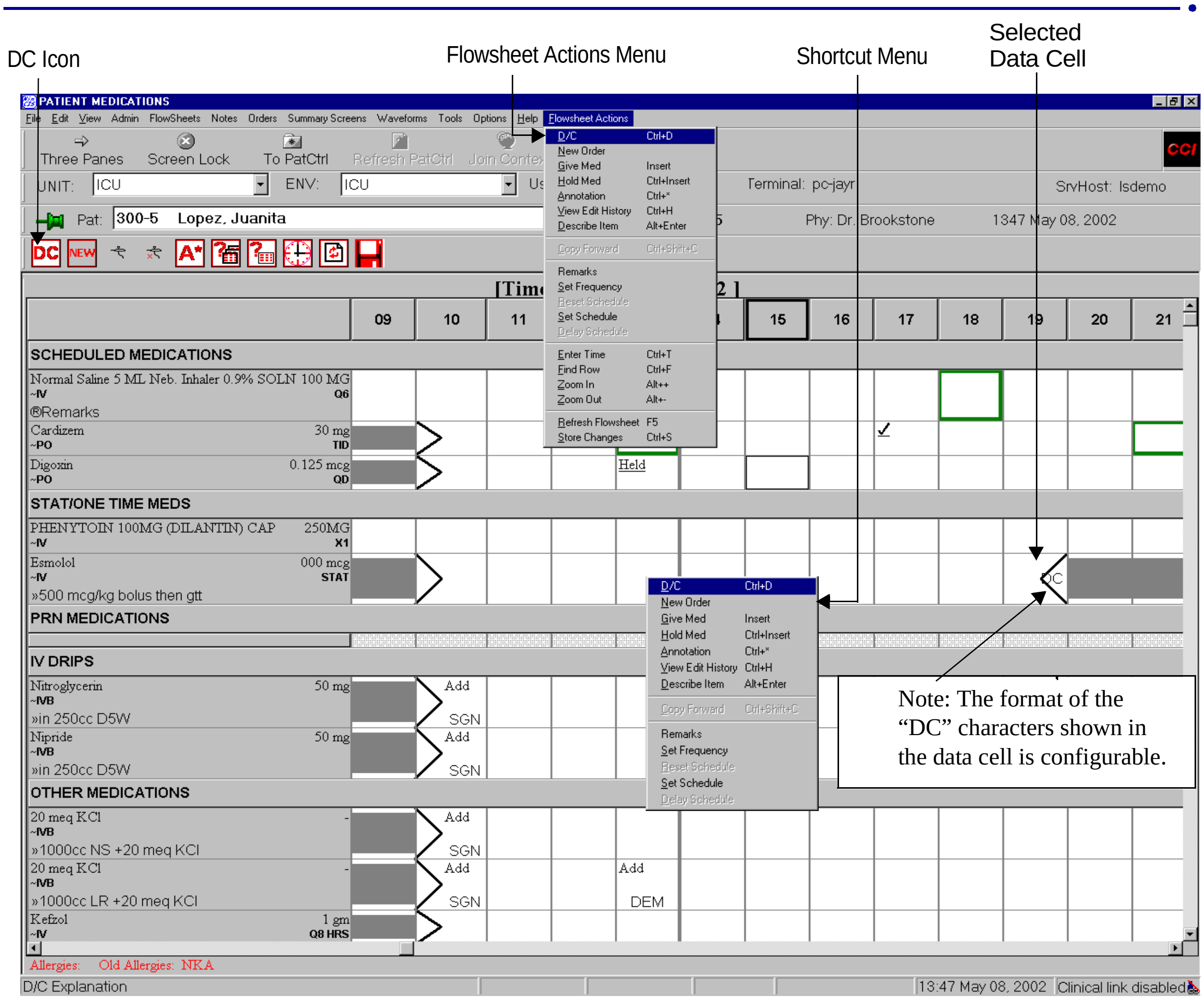
| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell in a time column for the medication to be held. | |
| 2. Select **Hold Med** from the **Flowsheet Actions** drop-down menu *or. . .* right click in the data cell to select **Hold Med** from the **Shortcut Menu** *or. . .* click on the **Hold Med** icon. | A hold marker (Held) is displayed in the selected data cell. |



## Discontinue Medication

A medication row that is discontinued drops off of the flowsheet screen after a specified time period. A medication row that is Discontinued is discontinued on every flowsheet the medication appears. For sites with a pharmacy interface, external orders can be discontinued from a flowsheet. This option is configured by CliniComp Client Services.

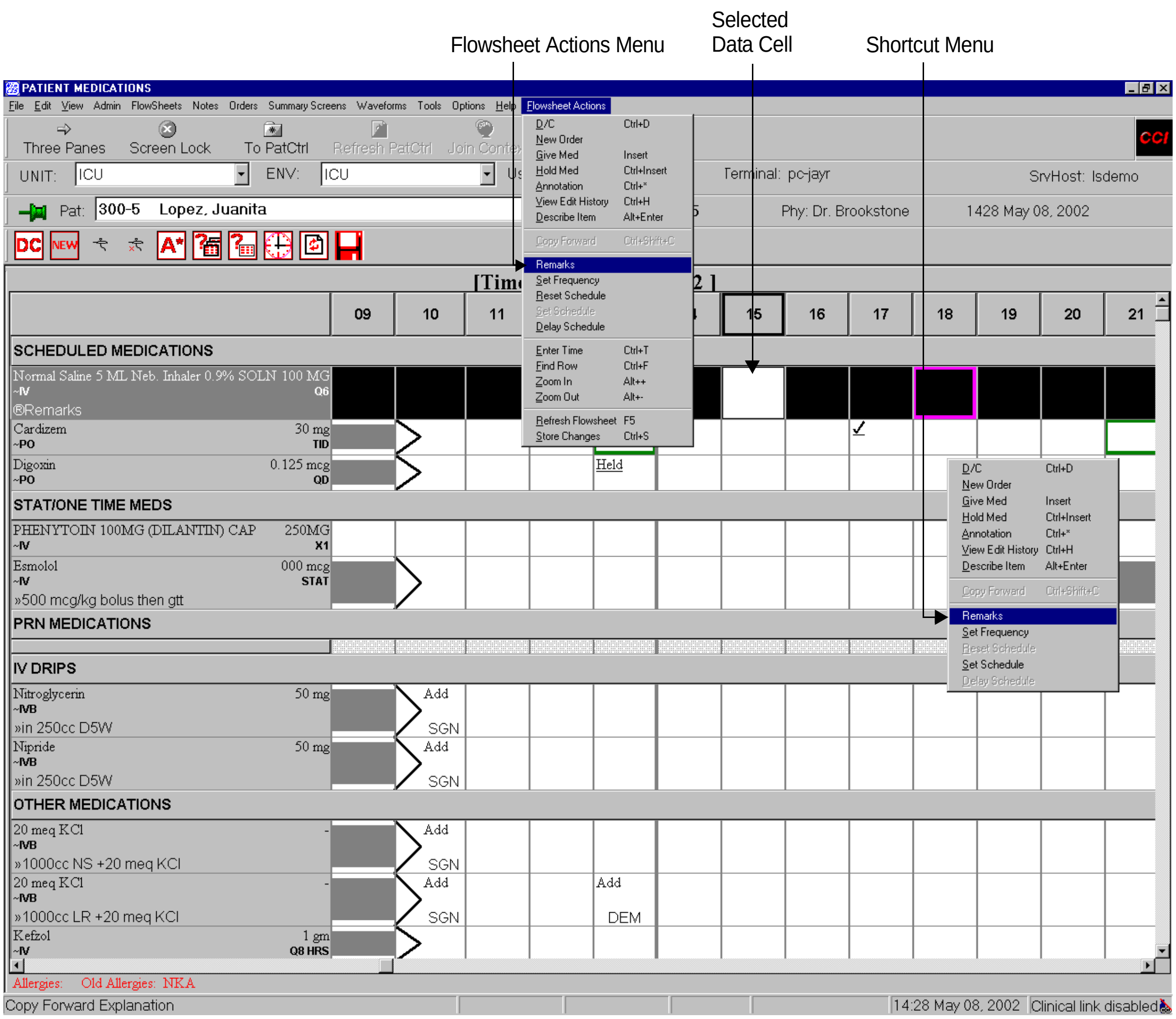
| Step by Step | Additional Information |
|---|---|
| 1. Select the data cell for the medication you would like to discontinue. | |
| 2. Click **Flowsheet Actions** on the Menu Bar and select **D/C** from the drop-down menu.<br>**- or -**<br>Right mouse click in the data cell and select **D/C** from the **Shortcut Menu**.<br>**- or -**<br>Click the **DC** icon**.** | An arrowhead appears in the selected data cell and a bar indicates that the medication is cancelled in the subsequent data cells.<br>To remove the **D/C** command from a medication, click on the data cell that contains the arrowhead and click **D/C** again.<br>To adjust the **D/C** time forward or back, click on the desired data cell and select **D/C** again. |



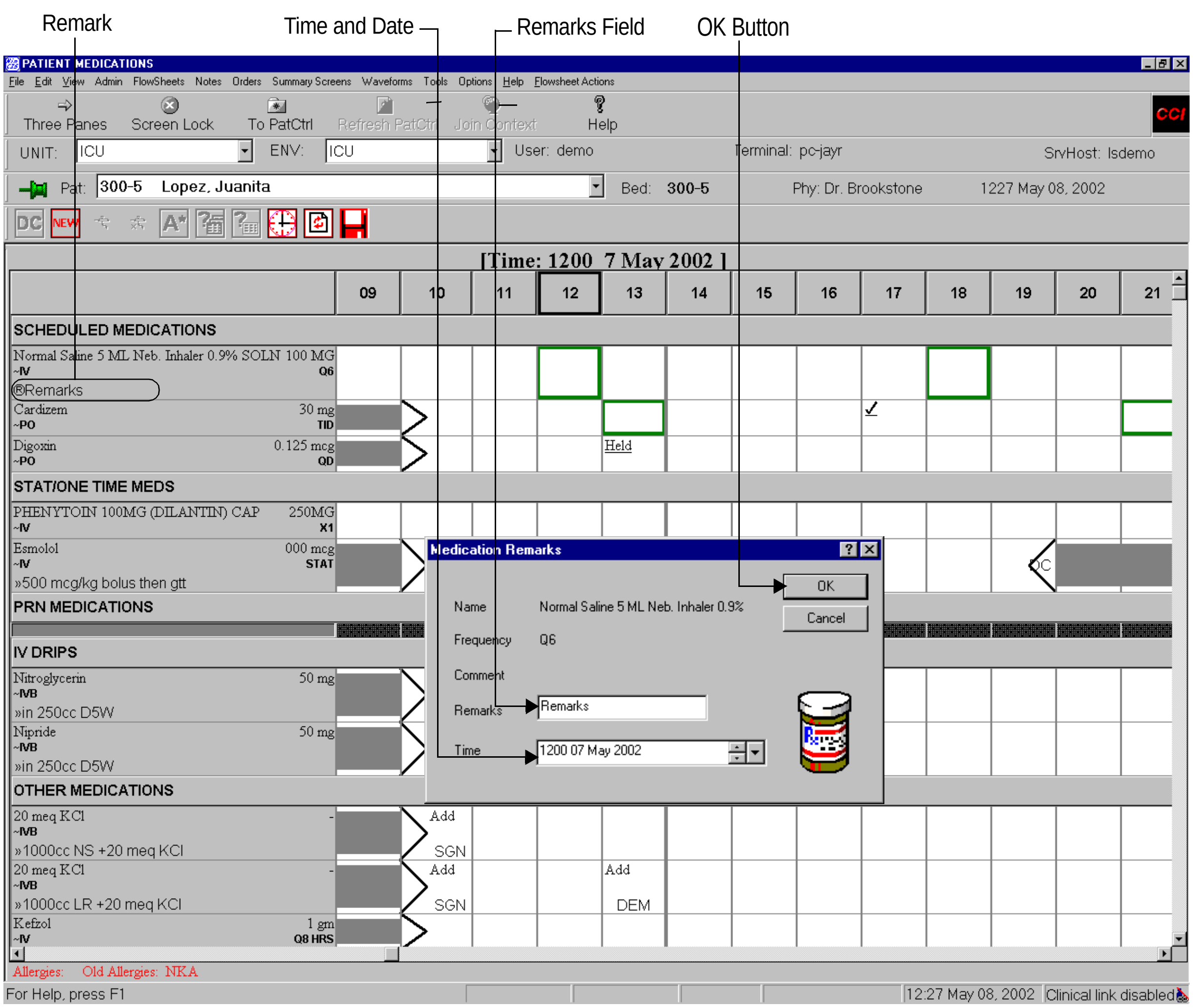
## Medication Remarks

Use Medication Remarks to display information that is pertinent to a medication. A Remark can be edited or deleted (unlike an order Comment that cannot be edited or deleted).

| Step by Step | Additional Information |
|---|---|
| 1. Select a data cell for the medication remark. | |
| 2. Select **Remarks** from the **Flowsheet Actions** drop-down menu, or. . . Right click in the data cell and select **Remarks** from the **Shortcut Menu**. | The **Medication Remarks** window displays. |



| Step by Step | Additional Information |
|---|---|
| 3. Type the remark in the **Remarks** field. | |
| 4. Select a date and time from the Time field. | The default is the date and time of the data cell selected in Step 1. |
| 5. Click the **OK** button. | The remark is displayed beneath the medication label. |
| | To edit a remark, repeat Steps 1thru 5 and type the new remark in Step 3. To delete a remark, repeat Steps 1thru 5 but skip Step 3 (leave the **Remarks** field blank). |




**Note:** the remark displays in the data cell containing the remark and subsequent data cells.

## Lab Entry Flowsheet

Use the **Lab Entry Flowsheet** to chart the results of lab tests. Data can be entered directly in the **Lab Entry Flowsheet**, or information can be sent through an interface with a laboratory computer system. The **Lab Entry Flowsheet** contains the following specialized features:

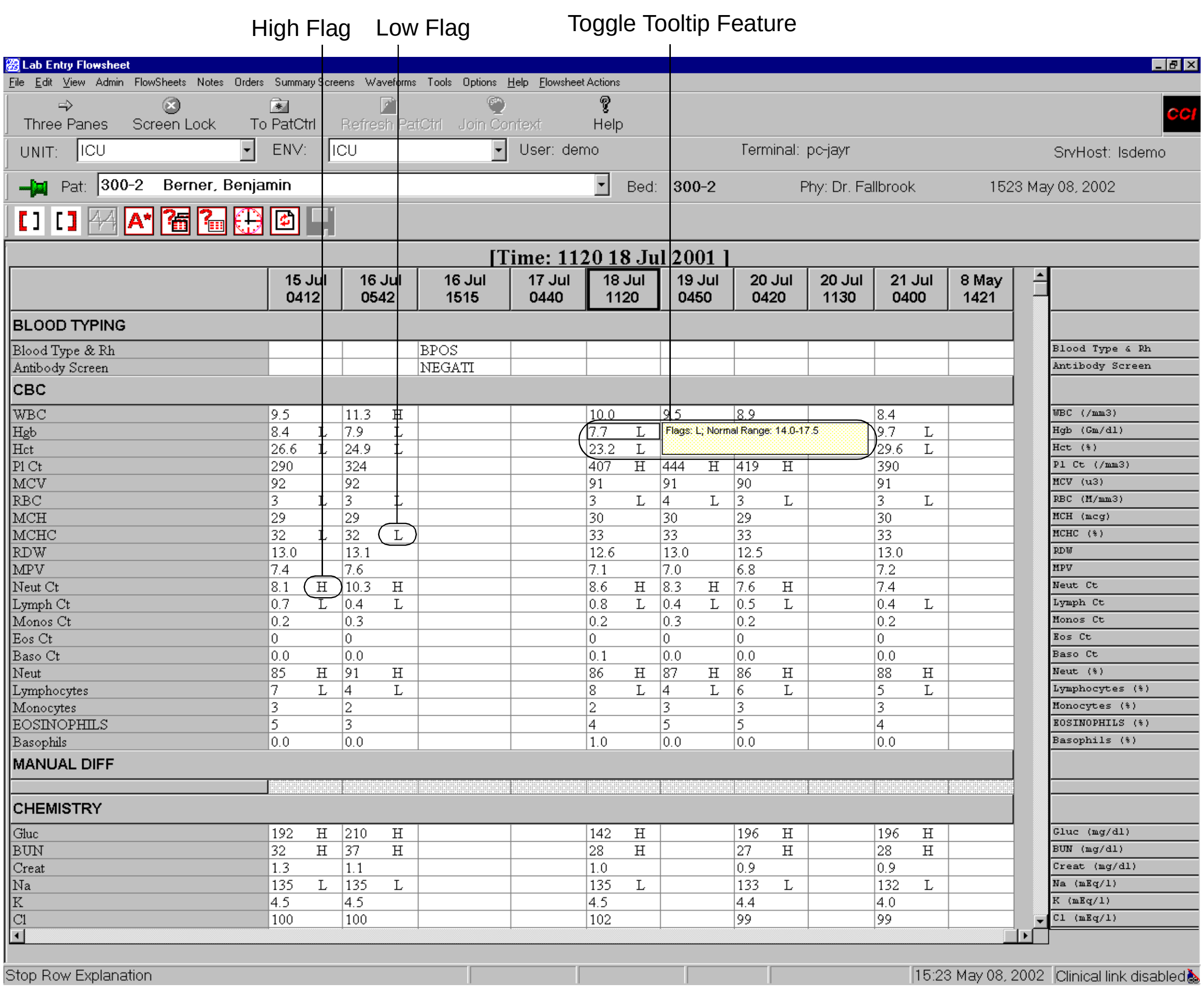
- High/Low Flags
- Toggle Tooltip

### High/Low Flags

High and low flags can be configured to indicate when lab results have values outside a specified normal range. A value that is higher than the normal range is indicated with an **H** and a value that is lower than the normal range is indicated with an **L**. These flags are displayed for data received only through an intface.

### Toggle Tooltip

The Toggle Tooltip feature (see Toggle Tooltip on page 83) displays a high/low flag, if any, followed by the normal range for the lab test.



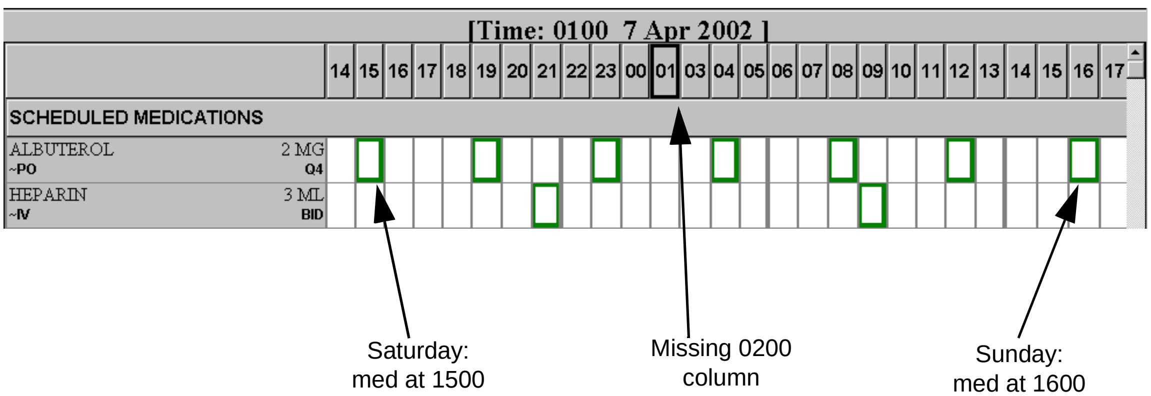
## Daylight Savings Time

Flowsheets are affected by the time shifts for Daylight Savings Time. Medication schedules are automatically adjusted by Essentris to maintain the prescribed schedules. The following paragraphs describe how Essentris manages these time shifts.

### Spring Time Change

Daylight Saving Time begins on the first Sunday of April. Essentris clocks move forward from 0159 to 0300, skipping 0200. All flowsheets show their time columns without a 0200 column. See the example below.

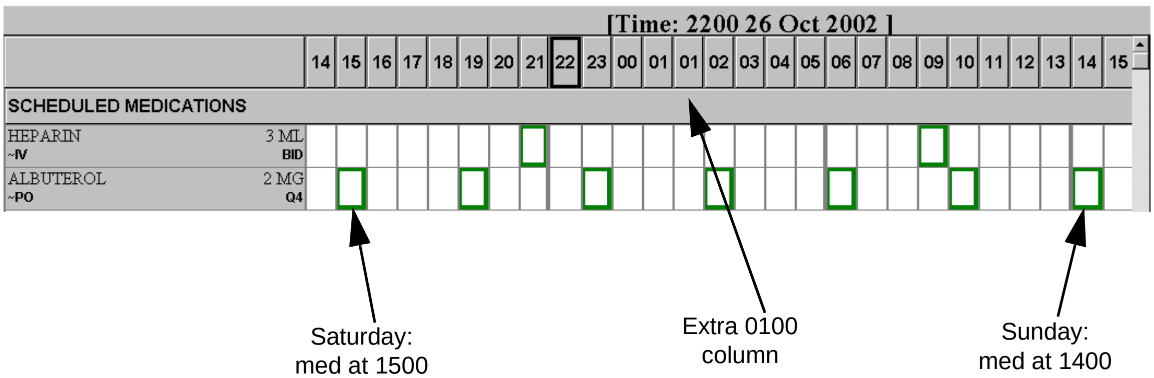
**Note:** Do *not* reset schedule markers because of the time change. Periodic schedule markers such as Q2, Q3, and Q12, shift forward one hour permanently to maintain the fixed number of hours between medications. For example, a Q4 schedule for 03, 07, 11, 15, 19 and 23 on Saturday, permanently shifts to 04, 08, 12, 16, 20, and 00 on Sunday.



## Fall Time Change

Daylight Saving Time ends on the last Sunday of October. Essentris clocks turn back from 0200 to 0100, repeating the 0100 hour. All flowsheets show their time columns with an additional 0100 column. See the example below.

**Note:** Do *not* reset schedule markers because of the time change. Periodic schedule markers such as Q2, Q3, and Q12, shift back one hour permanently to maintain the fixed number of hours between medications. For example, a Q4 schedule for 03, 07, 11, 15, 19 and 23 on Saturday, permanently shifts to 02, 06, 10, 14, 18, and 22 on Sunday.



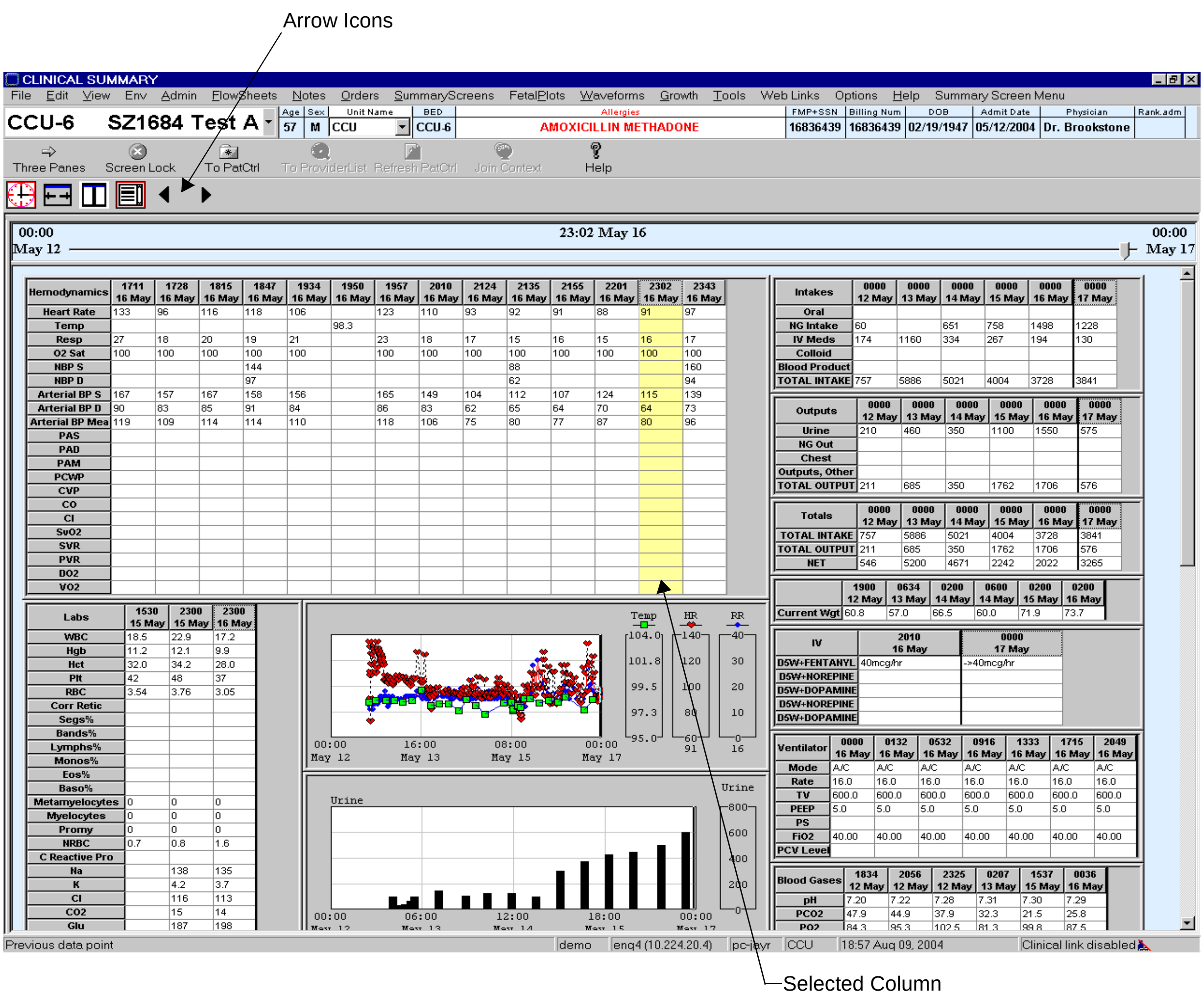
# Summary Screens



The Essentris Summary Screens display information categorized into tabular windows and plots for a selected patient. Each summary screen covers a specialized clinical aspect of patient care. The user is provided with a choicelist of screens to select for viewing.

The following is an example list of summary screens:

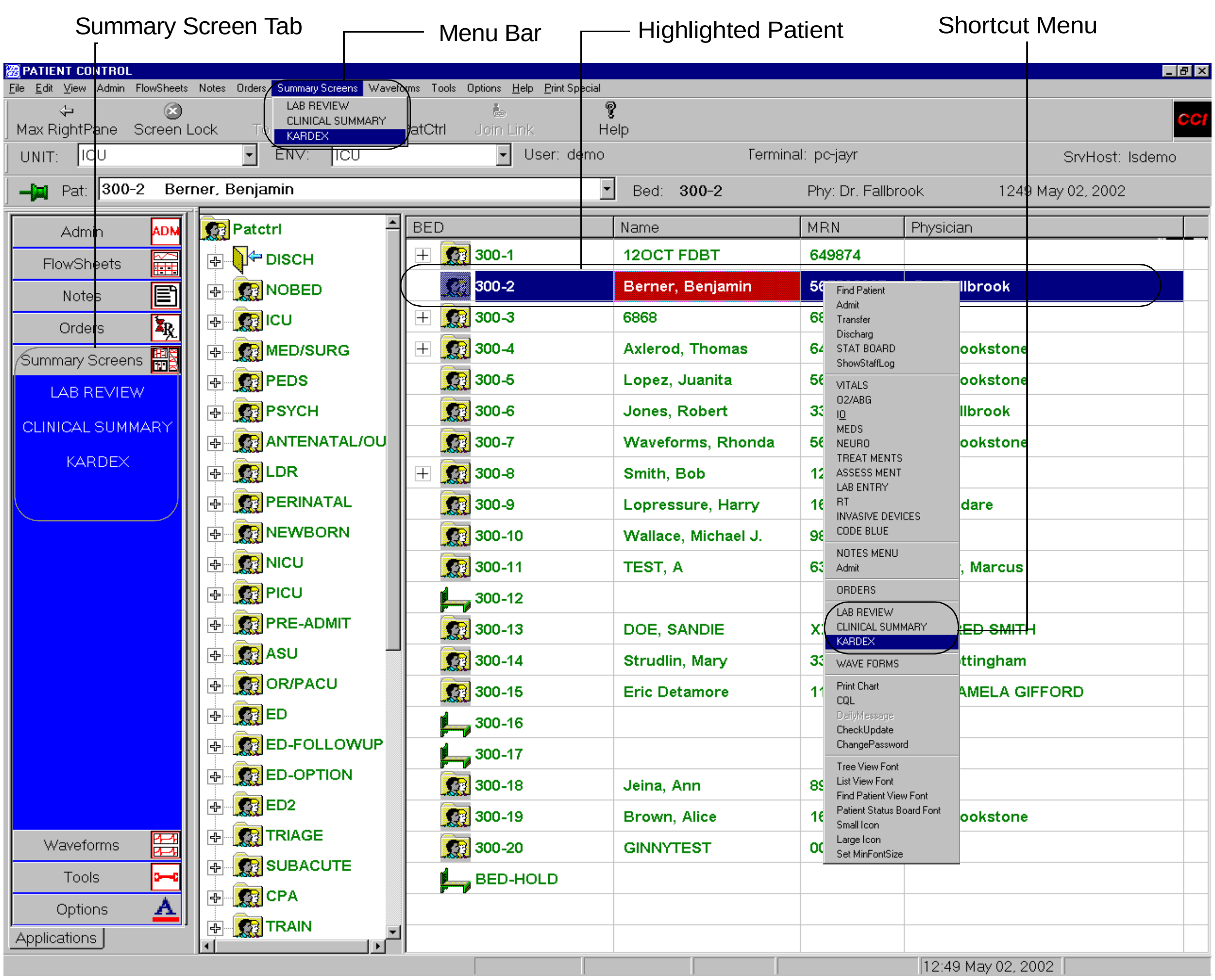
- Cardiac
- Antibiotics
- AntiCoag
- Vitals
- Respiratory Analysis
- Renal Function
- Nutrition
- Diabetic
- Lab Review
- Pulmonary



## Accessing Summary Screens

The Essentris Summary Screens can be accessed by selecting the Summary Screen Tab, Menu Bar, or Shortcut Menu. To access the Summary Screens, perform the following steps:

| | Step by Step | Additional Information |
|---|---|---|
| 1. | Select the patient. | The patient selected is highlighted. |
| 2. | Select the **Summary Screen** tab from the Application Bar and click on the applicable option, or . . .<br>Select an option from the **Summary Screen** menu on the Menu Bar, or . . .<br>Right mouse click on the application display and select the summary screen from the **Shortcut** Menu. | The selected **Summary Screen** appears. |



## Navigating Summary Screens

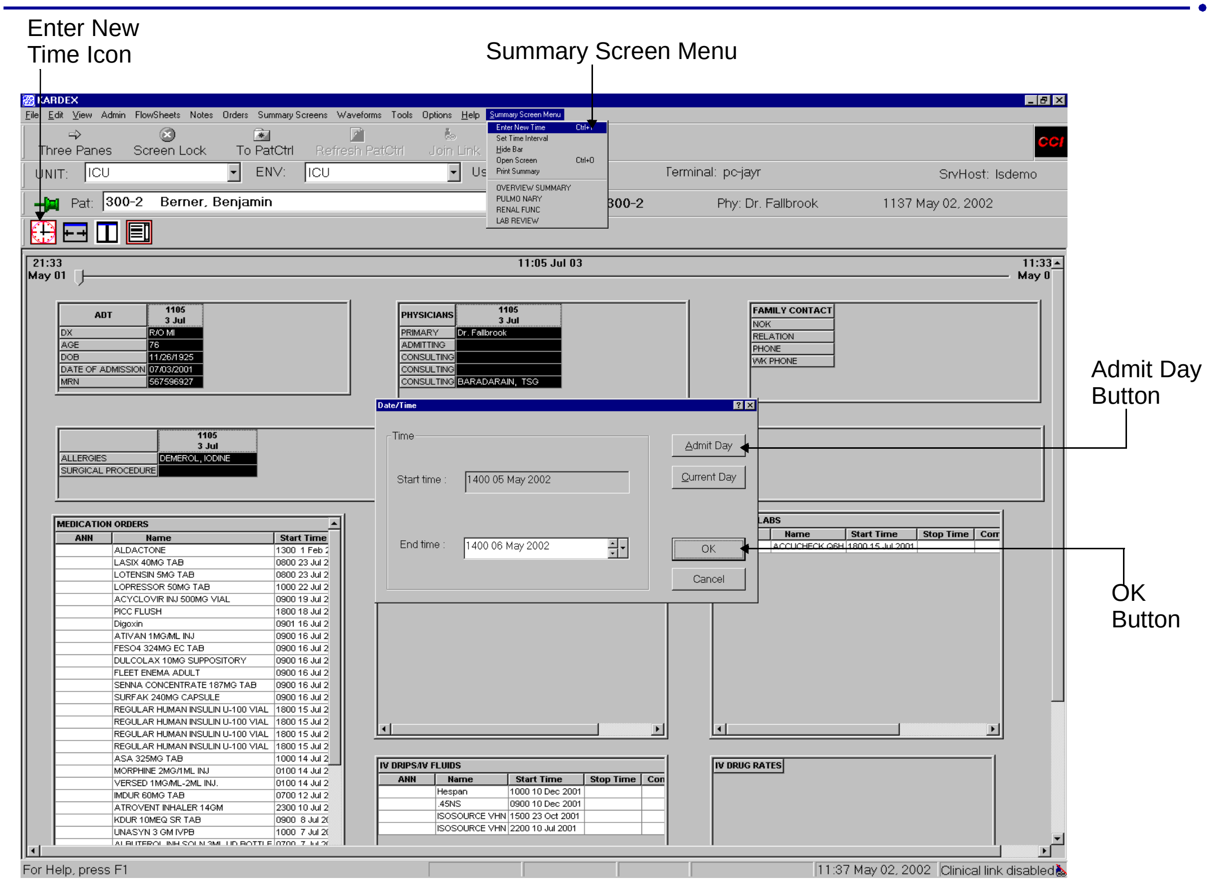
Summary Screens include the following navigation features.

- There are no permanent vertical or horizontal scroll bars in the tables on Summary Screens. Tables with time rows, orders and comments display scroll bars when they are needed.
- The mouse wheel can be used to scroll up and down in Summary Screens.
- New display colors are used: The selected time is highlighted in yellow, and the background color for the screen is pale blue.
- Left- and right-arrow icons are added to the icon bar. For example, in the Clinical Summary screen, they are used to simultaneously move the focus to the next time columns in the various tables. The focus columns are highlighted in yellow. Clicking the left-arrow icon moves the focus to the next earliest time column in both tables. Clicking the right-arrow icon moves the focus to the next latest time column. The icons have the same function as the arrow keys on the keyboard.
- When the time values in the time columns in one table do not match the time values in another table, the closest time column, in time value, is selected. The time column in one of the tables is not highlighted, but the vertical border for the column becomes a thick line to mark the column for visual reference.
- To maximize screen space, Summary Screens can be configured to hide empty rows. Contact CliniComp Client Services to configure this option.
- Dragging the time slider changes the current selected time. The respective time columns are highlighted as the time slider is moved.

## Enter New Time

The **Enter New Time** function specifies the duration for the display of summary screens. To set the time of the duration, perform the following steps:

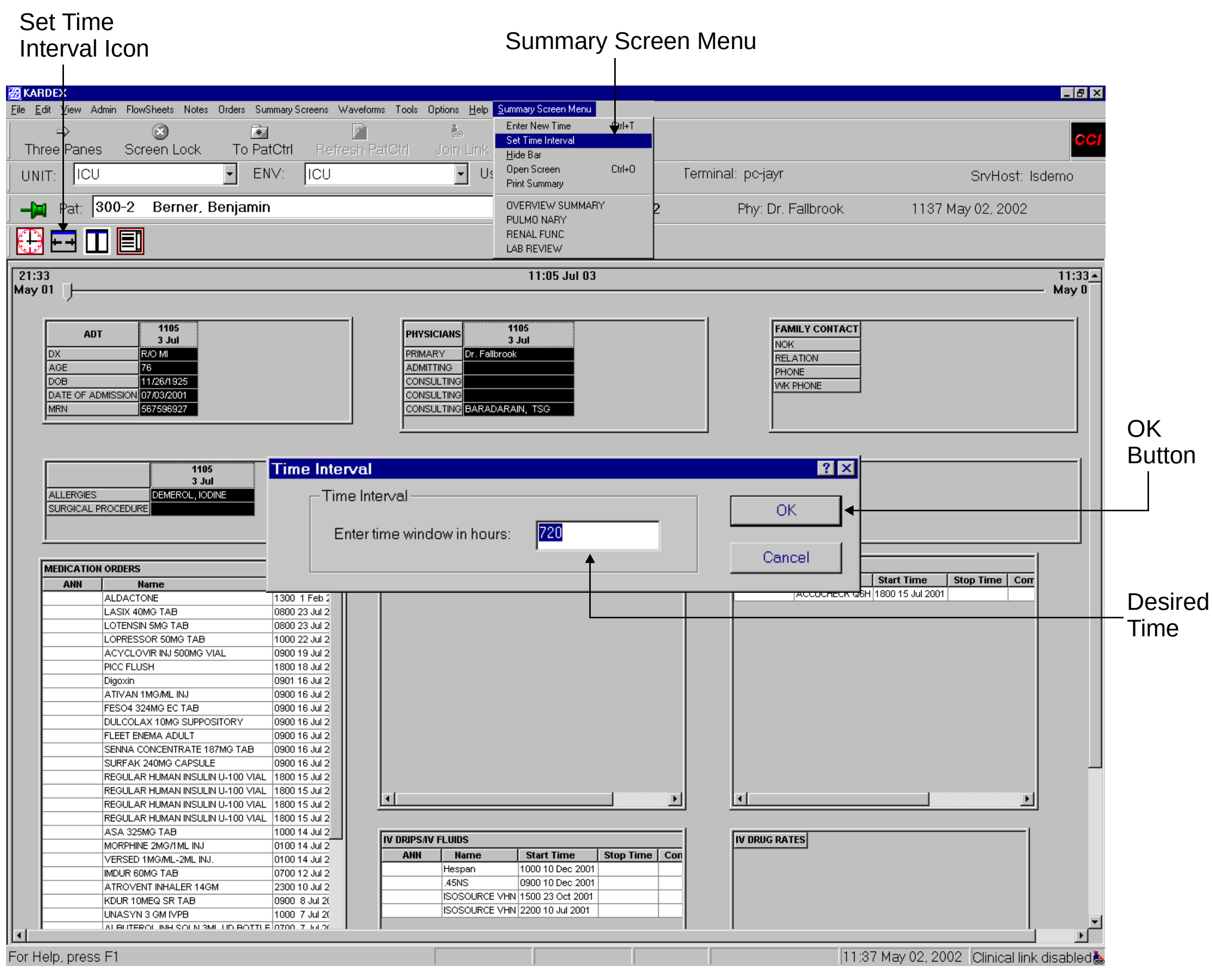
| Step by Step | Additional Information |
|---|---|
| 1. On the **Summary** screen, select **Enter New Time** from the **Summary Screen Menu**, **Shortcut** menu (Ctrl+T), or from the **Enter New Time** icon. | The **Date/Time** window appears. |
| 2. Enter the **End Time** using the Up and Down arrows or manually entering time into the text field. | Selecting the arrow next to the **End Time** field opens a calendar for entering the date and time. |
| 3. Click on the **Admit Day** button. | In the **Date/Time** window, use the **Admit Day** button to put the date of admission in the **Start Time** field, or optionally use the **Current Day** button to put the current day in the **End Time** field. |
| 4. Click on the **OK** button. | The Start Time is changed to correspond with the selected End Time. The summary screen display is altered by the time parameters. |



## Set Time Interval

The **Set Time Interval** menu option is an alternate way of manipulating the time of summary screens. The time interval defines the window of time within which summary screen information is displayed. It defines the time period between the Start Time and the End Time. To set the time interval of a summary screen, perform the following steps:

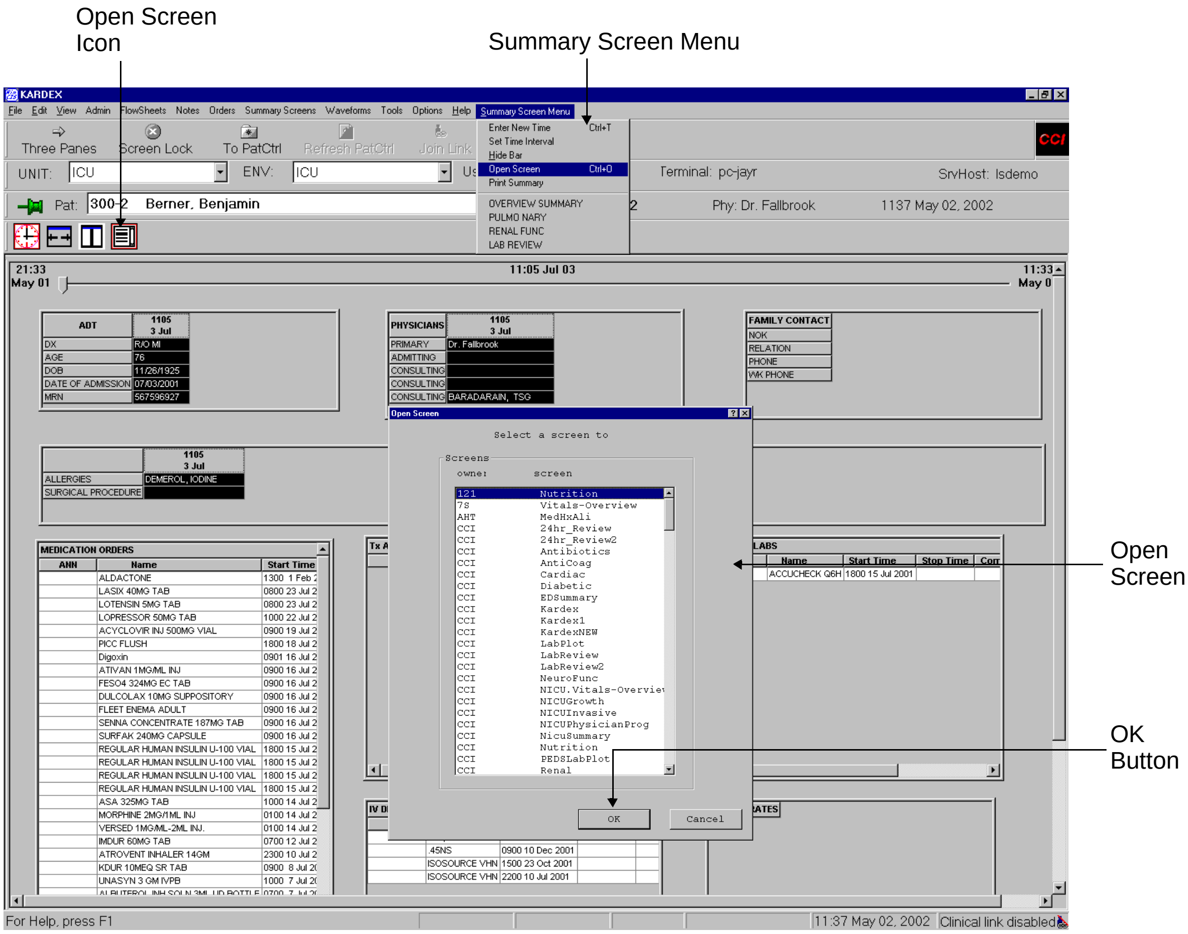
| Step by Step | Additional Information |
| --- | --- |
| 1. On the Summary screen, select **Set Time Interval** from the **Summary Screen Menu**, **Shortcut** menu, or from the **Set Time Interval** icon. | The **Time Interval** window appears. |
| 2. Enter the new time in hours in the text field. | The summary screen display is altered by the user-specified time interval. |
| 3. Click on the **OK** button. | |



## Open Screen

The **Open Screen** option in the Summary Screen Menu includes a choicelist of available summary screens. To use the **Open Screen** option, perform the following steps:

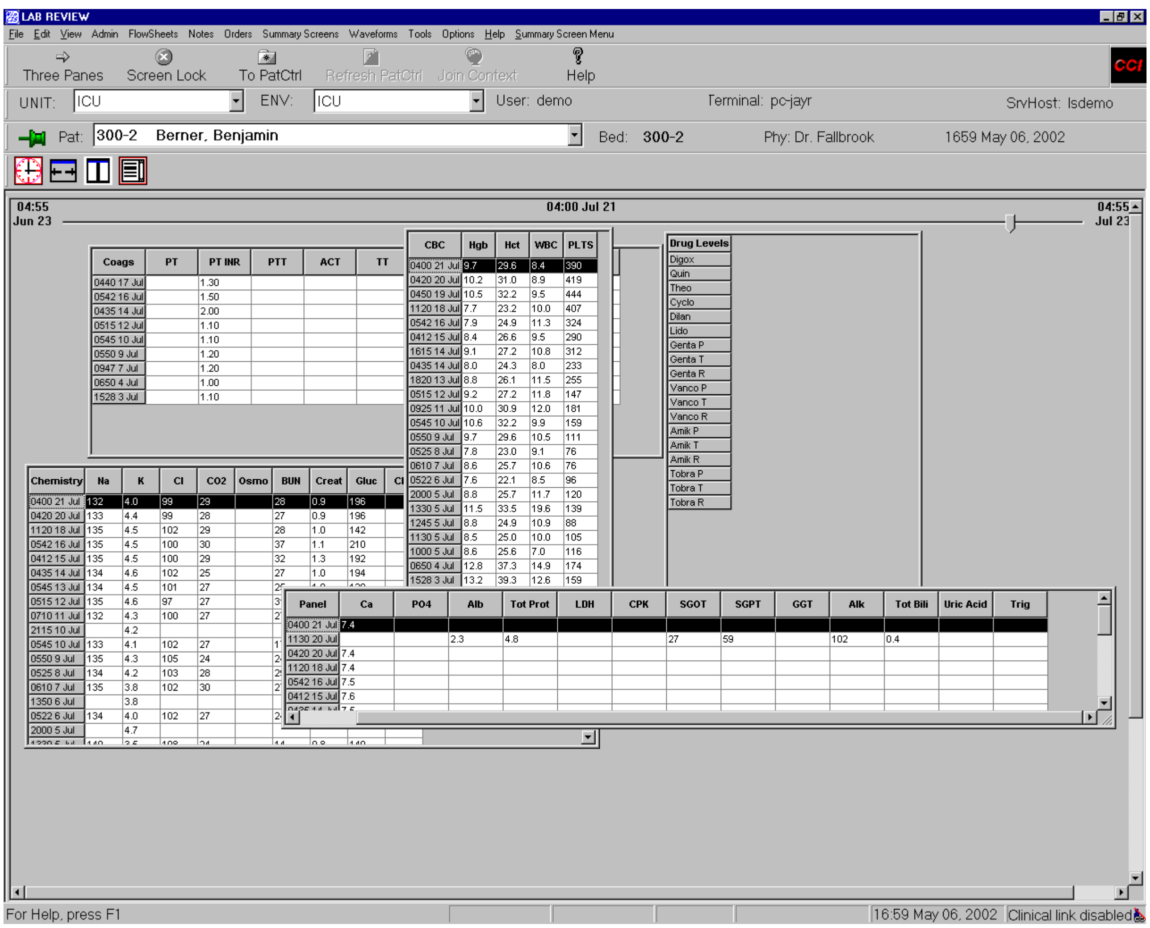
| Step by Step | Additional Information |
|---|---|
| 1. On the Summary Screen, select **Open Screen** from the **Summary Screen Menu**, **Shortcut** menu, or the **Open Screen** icon. | The **Open Screen** window appears. You can also use the keyboard shortcut **Ctrl+O**. A list of available screens is displayed, categorized by the owner. |
| 2. Scroll up or down to select the screen to be loaded. | |
| 3. Double-click on the screen or select the screen and click the **OK** button. | The selected summary screen is displayed. |



## Changing The Layout of Summary Screen Windows

The layout of the summary screen on display can be altered. Various sections of the screen such as the Plot section, Totals section, and so forth, can be moved and enlarged manually. To change the layout of the summary screens, perform the following steps:

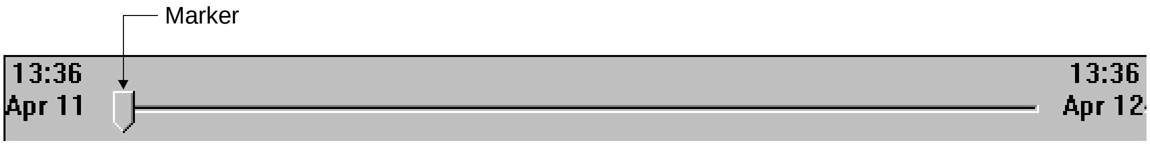
| Step by Step | Additional Information |
|---|---|
| 1. Select a summary screen window. | |
| 2. To move a window, click and hold the left mouse button to drag and drop the window to the new location. | All windows within the summary screens can be moved anywhere in the display area. When you click on a window, it becomes the active window and is placed on top of all other windows. |
| 3. To resize a window, place the cursor on the edge of the window and drag the edge to resize the window. | The cursor changes into a double arrow when resizing. |



## Summary Screen Timeline

The summary screen includes a time line that defines the time period of the patient data to be viewed. To adjust the view within the time period, drag the time marker along the time line. The time of the marker's position is displayed in the center of the screen. Data corresponding to the selected time is displayed below.

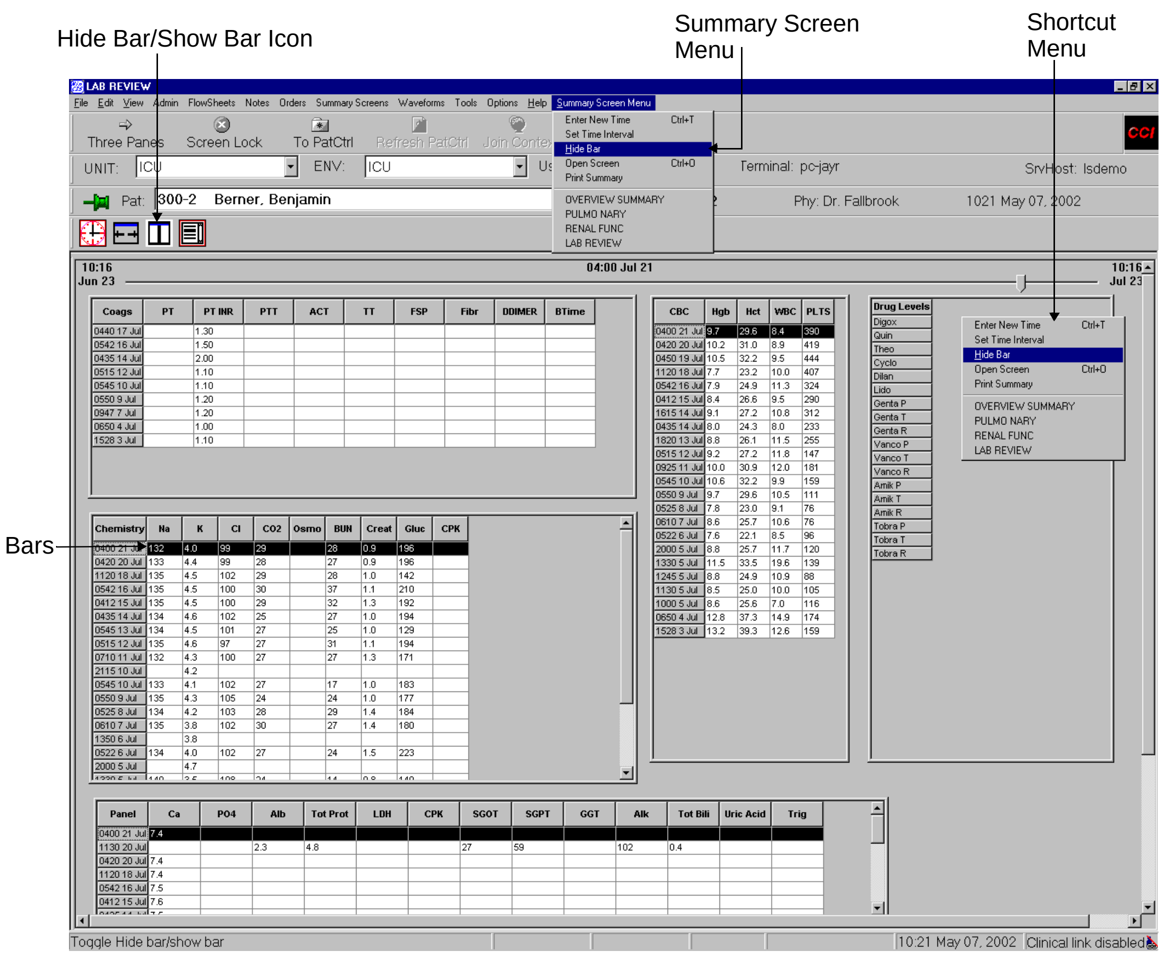
The Timeline marker is placed by default in the time corresponding to the last data item in a selected Summary Screen. If there is no data recorded for the time specified, the marker is placed in the left end of the Timeline.



## Hide/Show Bar

Summary screen sections can optionally display a bar to highlight the selected time period in each section in which the time period occurs. use the Hide/Show Bar feature to toggle the bars off or on. Use the following step to select the Hide/Show Bar:

| Step by Step | Additional Information |
|---|---|
| 1. Select **Hide Bar** or **Show Bar** from the **Summary Screen Menu**, **Shortcut** menu, or from the **Hide Bar/Show Bar** icon. | This summary screen menu option is a toggle feature. The bar is displayed or hidden from view depending on the selection and the current state of the screen. |



Section

# Patient Notes

6

Notes features include creating, editing, and navigating clinical notes. Using the basic Notes menu, you can display Notes in View Mode (Read-Only) or Edit Mode.

The Notes application includes the Care Plan function starting on page 136, which is used to identify, show status, and resolutions for patient problems.

Notes functions are presented according to the mode that is being used. As with most of the other components of Essentris, Notes can be configured to a hospital or a unit's requirements.

## Accessing Patient Notes

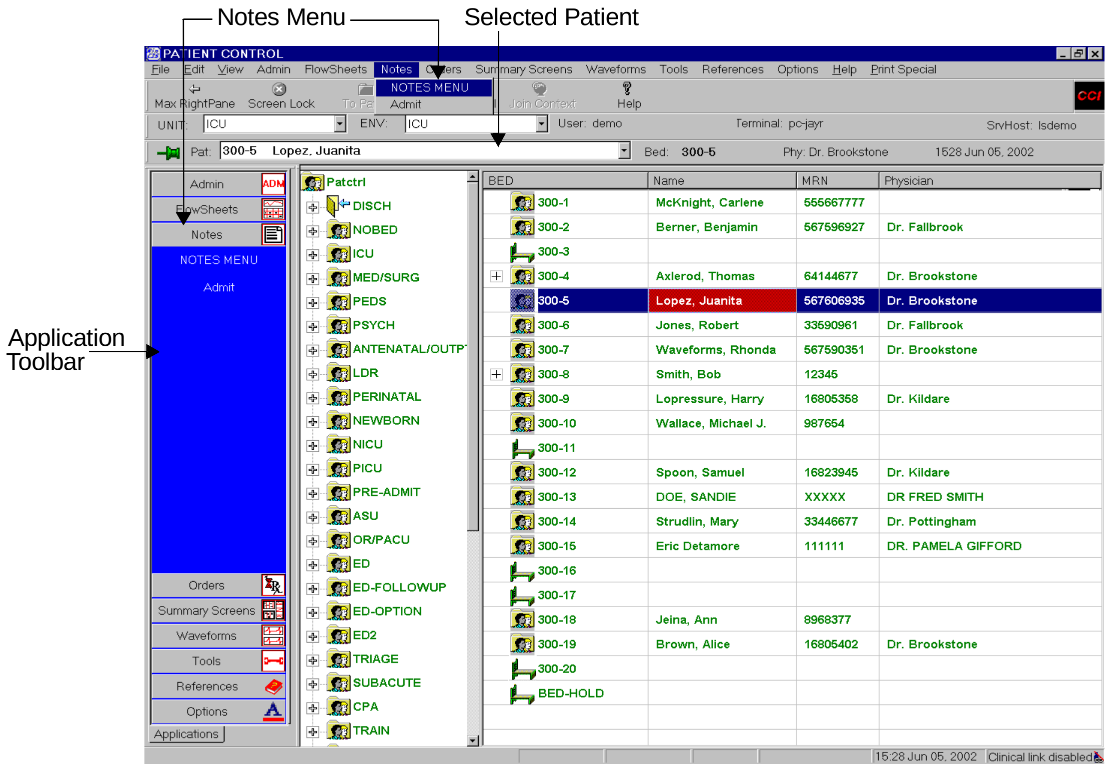
Use the following steps to access Notes:

| | Step by Step | Additional Information |
|---|---|---|
| 2. | The **Patient Control** screen, select a patient in the displayed patient list. | The patient is highlighted. |
| 3. | Select **Notes Menu** from the **Notes** tab in the application toolbar, the shortcut menu (right-click), or from the **Notes** pull-down menu. | The **Notes Menu Screen** for the selected patient appears. The **Notes Actions** menu is added to the menu bar. |

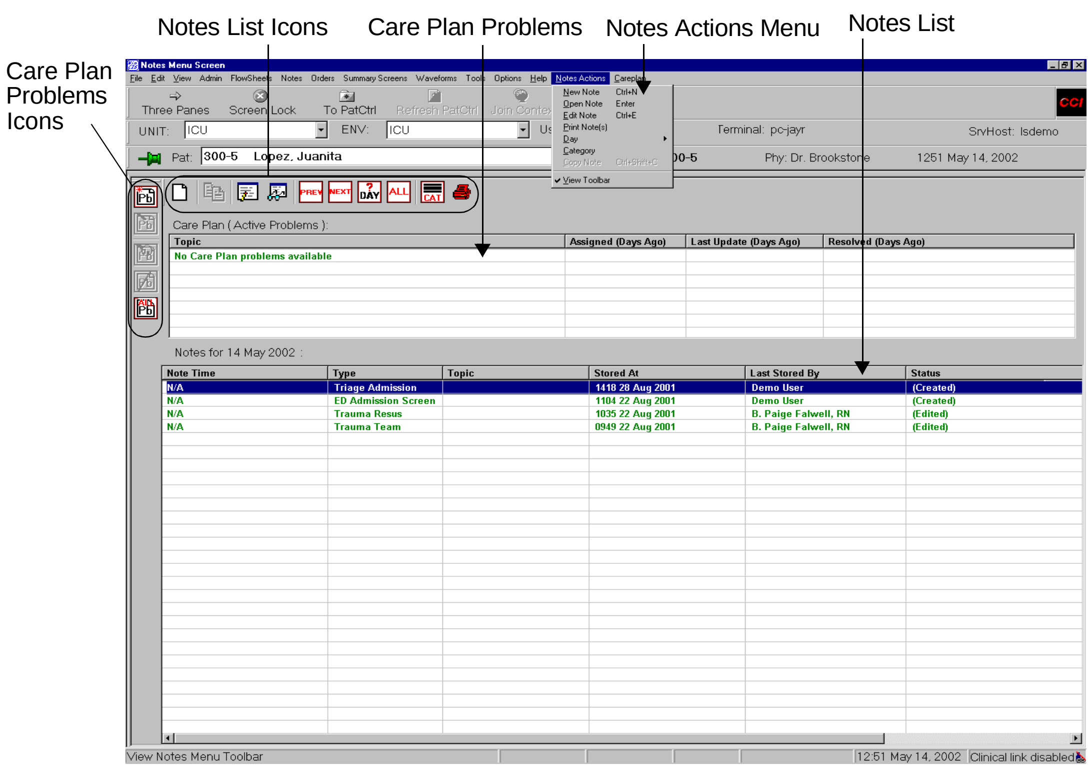
Note

*Multiple notes can be open simultaneously. Each note is displayed in a separate window. However, the same note cannot be opened more than once.*

## Patient Control Screen:



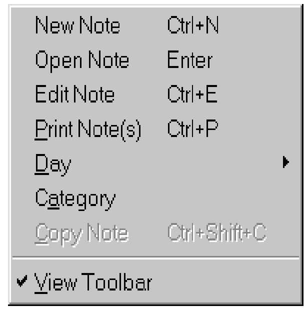

## Notes Menu Screen:



## Notes Menu Screen

The list of notes shown on the **Notes Menu Screen** can be sorted by clicking on the column headers. For example, click the Note Type column header to sort the notes according to type. Each click alternates the sort between ascending and descending order.

## Essentris Notes Functionality




Access the Notes menu options using the **Notes Actions** pull-down menu or the Notes shortcut menu. Use the following list to locate the description of a specific menu option:

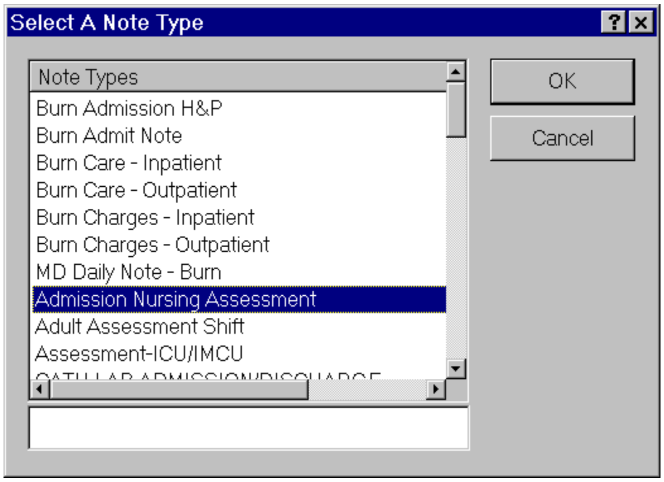
- **New Note** starts on page 123
- **Open Note** starts on page 128
- **Edit Note** starts on page 128
- **Print Note(s)** starts on page 133
- **Day** starts on page 134
- **Category** starts on page 134
- **Copy Note** starts on page 135

Note: *All Notes screens can be scrolled using the mouse wheel.*

### New Note

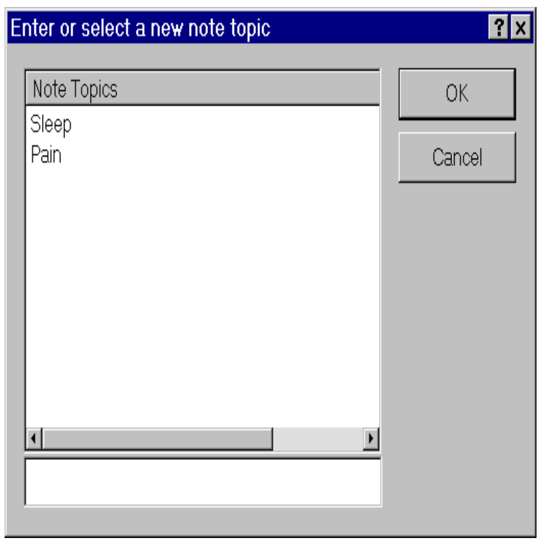
You can create new notes of various types and templates by using the **New Note** menu option. Use the following steps to create a new note:

| Step by Step | | Additional Information |
|---|---|---|
| 1. | Open Notes. | The patient selected is highlighted. |
| 2. | Select **New Note** from the **Notes Actions** menu. | The **Select A Note Type** window appears. |
| 3. | In the **Select A Note Type** window, select a note type from the displayed list of types. | Optionally, you can type the name of a note type in the text box at the bottom of the window. The displayed list changes to show only those notes with names that contain your entry. |
| 4. | Select **OK**. | A new note using the selected Note Types form is displayed. The new note form includes a menu bar and a shortcut toolbar. See the example New Note screen on page 125. |



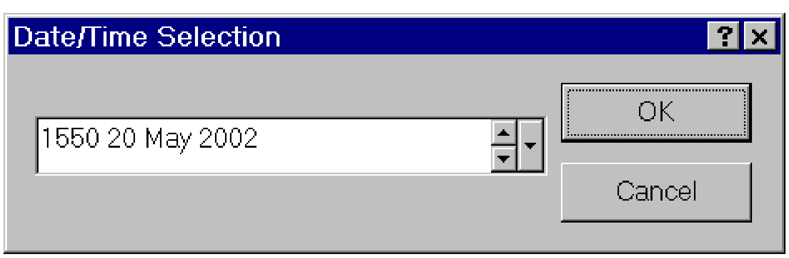

### Topic Notes

If a note type, such as a Clinical Note, requires a topic, the **Note Topics** window appears. Select a topic, or enter a new topic, and click **OK**..

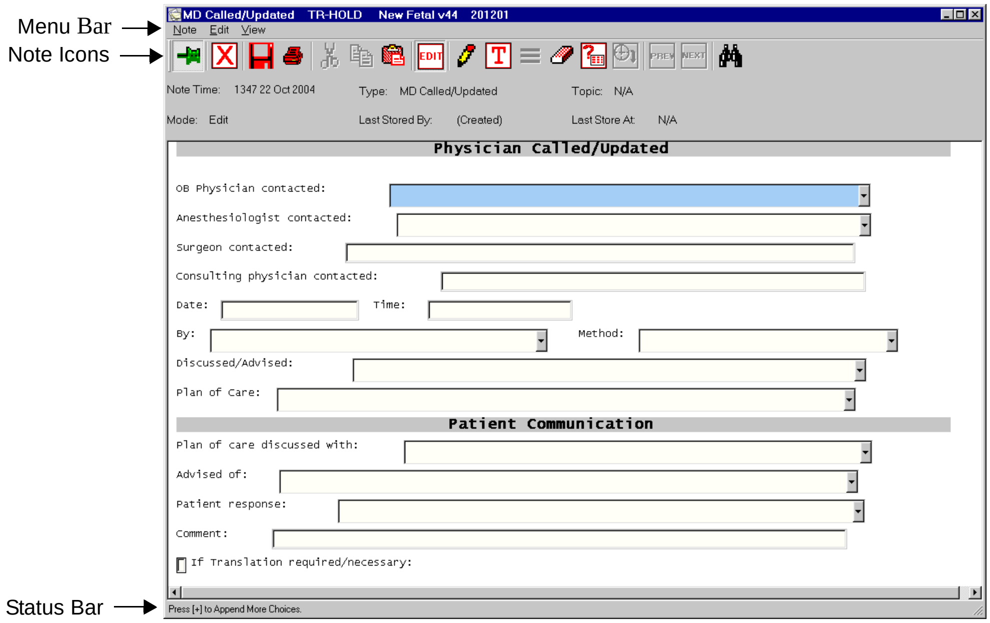



### Timed Notes

If a note requires a date and time, the **Date/Time Selection** dialog box appears. Use the arrow buttons to enter a date and time or default to the current date and time.



Example New Note screen:




## Choicelist Types

A choicelist field is identified by the arrow button at the right of the text box. In the example **New Note** screen, the the first two fields are choicelists.

There are two types of choicelist:

- **Enforced**
  When a choicelist is enforced, the text box must contain only items from the choicelist. Free text is not accepted by the text box.
- **Unenforced**
  When a choicelist is unenforced, the text box can contain items from the choicelist and/or text entered from the keyboard. Free text is accepted by the text box.

  For unenforced choicelists, be sure to select the item from the list with the cursor or the arrow key and press Enter. Otherwise, pressing Enter without selecting the item name causes the partially entered name in the text box to be accepted as a free-text name.

## Choicelist Modes

There are two choicelist modes: **Append** and **Replace**. The Status Bar displays the mode. Use the **Insert** key to switch modes.

Use the **Append** mode to add choicelist items to existing choicelist items in a text box. Use the **Replace** mode to replace existing choicelist items in a text box with new choices.

**Entering Choicelist Items in an Empty Text Box.** The choicelist mode is automatically set to **Append**. The Status Bar message should be “Now in Choicelist APPEND Mode. Press [Insert] to switch to REPLACE mode.” If any other message is showing, press the **Insert** key to toggle to the **Append** mode. First, display the choicelist by clicking the mouse anywhere in the text box or by clicking the text box arrow. If necessary, use the scroll bar to locate the choicelist item. Click the item to select it, or use the up- or down-arrow keys on the keyboard to select the item. Press the **Enter** key to enter the item in the choicelist text box.

To select multiple items from the choicelist, hold down the **CTRL** key while making the selections, and then press **Enter**. Use the **Shift** key to select consecutive items in the choicelist, and press **Enter**. Choices appear in the text box in the order selected.

**Appending Choicelist Items to a Populated Text box.** To append choicelist items to existing items, first open the choicelist by clicking the mouse in the text box or clicking the down arrow. Select an item from the choicelist and press **Enter** to append it to the existing text-box items.

The Status Bar message now reads "Press [+] to Append More Choices." To append more entries, press the **+** key on the numeric keypad and select the next item to be appended from the choicelist. The selected item is appended to the entries in the text box. Continue to press the **+** button and select additional items from the choicelist, one at a time, until all needed items are added to the text box.

**Replacing Choicelist Items in a Text box.** Open the choicelist by clicking the mouse in the text box or clicking the down arrow. The Status Bar message should be "Now in Choicelist REPLACE Mode. Press Insert to switch to APPEND mode." If any other message is displayed, press the **Insert** key to toggle to the **Replace** mode.

To replace all existing items in the text box, click on the new item from the choicelist. To add more than one replacement item, use the **Append** mode after the first replacement item is entered.

**Additional Features**

- When the cursor is moved using keyboard navigation, such as the **Tab** key or **Enter** key, to a field that contains text, the cursor is placed at the end of the text. The mode is now **Replace** mode. Pressing the **+** key changes the mode to **Append**, adds a space, and opens the choicelist containing available choices.
- When the first field in a Note is a choicelist field, the choicelist opens when the Note is opened.
- By using the mouse, the cursor can be placed anywhere in the text box field. This can be used to insert a new choicelist item between existing items in the text box.
- When a choicelist is configured with piped dependencies and some columns are blank, the choicelist displays the blank columns as empty.

**Searching a Choicelist with Auto-Match.** To search for specific choicelist items, use the Auto-Match feature. This feature is active only in the **Append** mode and can be activated by any of the following actions.

- Navigating from a field to a field that contains a choicelist.
- Clicking the choicelist arrow to open the choicelist.
- Pressing the **+** key to go into **Append** mode.

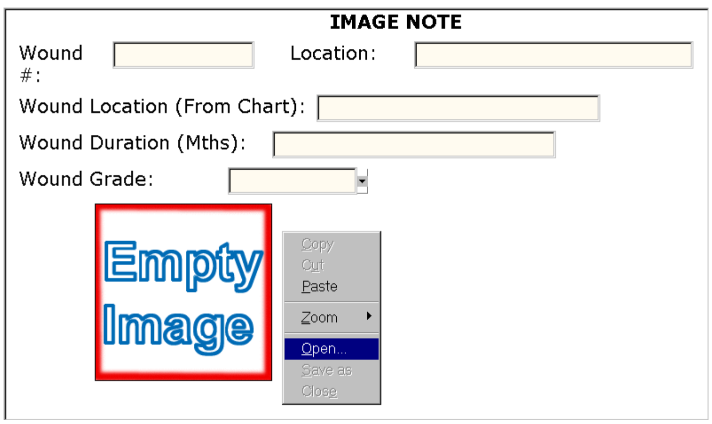
When typing in a choicelist field, the choicelist displays items at the top of the list that begin with the typed text. Choicelist items are placed at the end of the list that contain the typed text but not at the beginning of the item name. Text is matched from left to right and is *not* case sensitive.

When the text typed-in matches the beginning of a choicelist item, the item is highlighted. If the highlighted item is *not* the correct item, continue to enter additional characters to narrow the choices, or use the arrow keys to move to another item. Use the **Enter** key, **Tab** key, **Shift+Tab** keys, or click the mouse in a different field to put the highlighted item in the choicelist field. Use the **Esc** (escape) key to unhighlight an item.

> Note
>
> *When you are using the Auto-Match feature in an unenforced choicelist, be sure to select the item from the list with the mouse or the up- or down-arrow key on the keyboard and press* ***Enter****. Otherwise, pressing* ***Enter*** *without selecting the item name from the choicelist is interpreted by the system as a free-text entry.*

### Image Notes

To include a picture in a note, select **Image Note** from the **Select a Note Type** window and click **OK**. Image Notes are timed notes, see "Timed Notes" on page 124.




Images can be added to the **Image Note** from the Windows Clipboard by selecting **Paste** from the Image menu, or by opening an image stored in any directory accessible to the PC. Use the following steps to place an image from a PC directory into the **Image Note**:

| | Step by Step | Additional Information |
|---|---|---|
| 1. | To access the image, right-click in the **Empty Image** box to display the Image menu. | The Image menu is displayed. |
| 2. | Select **Open** to display the **Open** dialog box. | The **Open** dialog box appears. |
| 3. | In the **Open** dialog box, select the image to be added to the note and click **Open**. | |

## Open Note

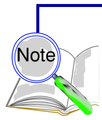
To open an exisitng note in read-only mode, highlight the note in the list of notes (see the **Notes Menu Screen** on page 122) and the use the **Open Note** menu option or press **Enter**.

## Edit Note

From the **Notes Action** menu, select the **Edit Note** option to make changes to existing notes.

| Step by Step | Additional Information |
|---|---|
| 1. Select a note from the displayed list of notes. | |
| 2. Select **Edit Note** from the **Notes Actions** menu or from the shortcut menu. | The **Validation Dialog** window appears. |
| 3. Enter your User Name and Password and click **OK**. | The note is opened in edit mode. Editable fields in the note are identified by thick borders. |

Annotations cannot be edited in Notes. If you access an annotation while in edit mode using **Next Note** or **Previous Note**, the system displays a warning message. The annotation can either be viewed in read-only mode or can be skipped.



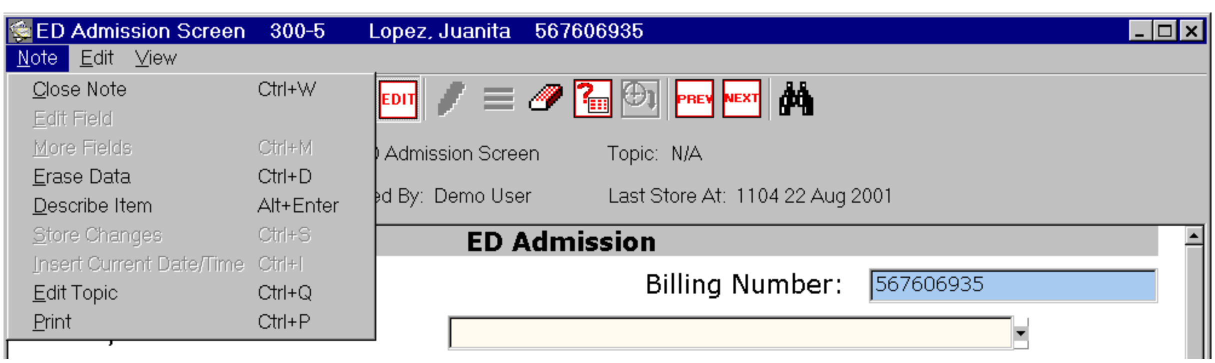

*Some notes contain items that might have stored calculations dependent on them. Calculated items are updated whenever the source data changes.*

## Edit Note Functions

The following menus are described for the edit mode of an open note: the **Note** menu, **Edit** menu, and **View** menu.

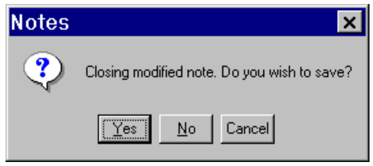
### Note Menu

The following edit-mode menu options are in the **Note** menu of the open note.



### *Close Note*

Use the **Close Note** command to close an open note. If changes are present, you are prompted to choose an action.




- Select **Yes** to save changes.
- Select **No** to cancel changes and exit the note.
- Select **Cancel** to cancel closing the note and return to the edit mode.

### *Edit Field*

Select **Edit Field** to expand editable text fields to more than one line.

### *More Fields*

Use the **More Fields** menu option to duplicate certain fields, if necessary:

1. Place the cursor in the field.
2. Select **More Fields** from the **Note** menu. The selected text field is copied in the note.

### *Erase Data*

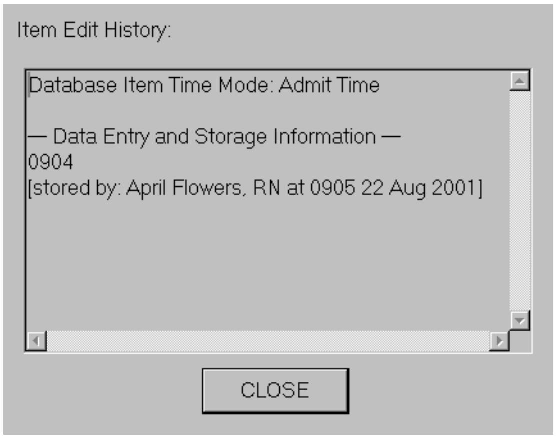
Clear data in an editable text field using the **Erase Data** menu option.

### *Describe Item*

Use the **Describe Item** menu option to view a description of a selected item as well as its edit history. Use the following steps for the **Describe Item** menu option:

| Step by Step | Additional Information |
|---|---|
| 1. Place the cursor in a text field and select **Describe Item** from the **Note** menu. | The **Item Edit History** window (read-only) appears. |
| 2. Double-click the title of the **Item Edit History** window. | The **Item Description** window (read-only) appears. |
| 3. Select **Close** to exit. | |

Note: *The **Item Description** window can be configured to display data base items showing the date and time that they are stored in the note. To use this option, Contact CliniComp Client Services.*





### *Store Changes*

After you edit Notes information, the note can be stored using the **Store Changes** menu option. You are prompted to enter your User Name and Password.

When a note is stored, the appropriate fields on the **Notes Menu Screen** such as **Stored At**, **Last Stored By**, and **Status** are updated. Changes to notes can also be stored upon closing the note.

### *Insert Current Date/Time*

Add the current date and time automatically to a text field using the **Insert Current Date/ Time** command. This menu option is available only in the Date and Time fields of a note.

Note

*Any text box in the note that contains a data base item can be configured to display the date and time that the item was stored. The data base item must be stored as Latest Time. To use this option, Contact CliniComp Client Services.*

### *Edit Topic*

A timed note can be associated with a user-defined topic using the **Edit Topic** menu option. Note topics are used for grouping and sorting Notes. Use the following steps to add a topic to a note or change an existing topic:

| Step by Step | Additional Information |
|---|---|
| 1. Select **Edit Topic** (Ctrl+Q) from the **Note** menu. | The system displays the existing topic associated with the selected note, if any. |
| 2. Enter or select the topic of your choice, and select **OK**. | The **Validation Dialog** window appears. |
| 3. Enter your User Name and Password, and click **OK**. | The user-defined topic is displayed for the selected note in the **Notes Menu Screen**. |

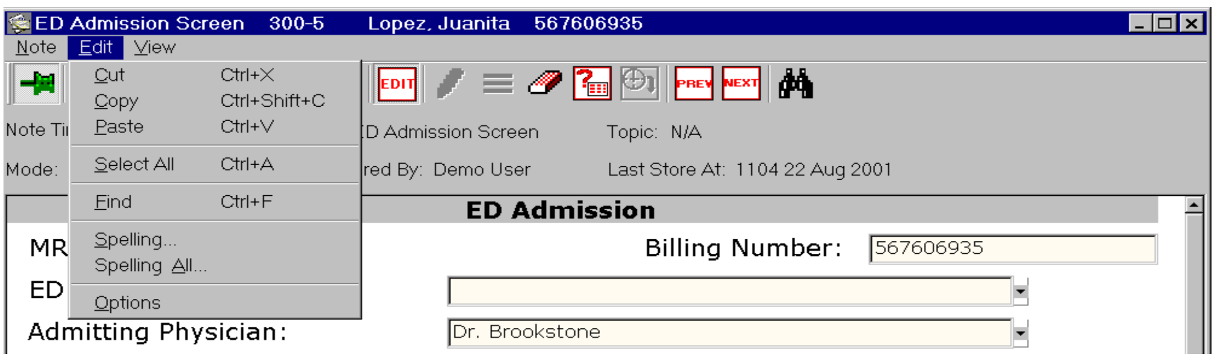
### *Print*

Use the **Print** option to print a note.

| Step by Step | Additional Information |
|---|---|
| 1. Select the **Print** option from the **Note** menu. | The **Validation Dialog** window appears. |
| 2. Enter your User Name and Password, and click **OK**. | The **Notes** dialog box appears. |
| 3. Click **OK** to confirm or click the x-box to cancel. | |

## Edit Menu

The following edit-mode menu options are in the **Edit** menu of the open note.




### *Cut, Copy, and Paste*

These are standard text-editing featues.

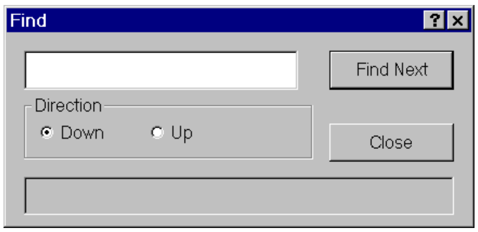
### *Select All*

Use **Select All** to select all data in a field.

### *Find*

Use the **Find** option to search for specific text.

| | Step by Step | Additional Information |
|---|---|---|
| 1. | Select **Find** from the **Edit** menu. | The **Find** search box appears. |
| 2. | Enter the text to be located in the text field. | **Find** searches field names and the data contained in the fields. **Find** is not case-sensitive. |
| 3. | Select a find direction: **Up** or **Down**. | |
| 4. | Click the **Find Next** button. | The object text is highlighted when it is located. If necessary, repeat Step 4 to locate the next occurrence of the object text.<br>A status indicator informs you about the state of the search. |




### *Spelling*

Use the **Spelling** option to check spelling in a specific field.

### *Spelling All*

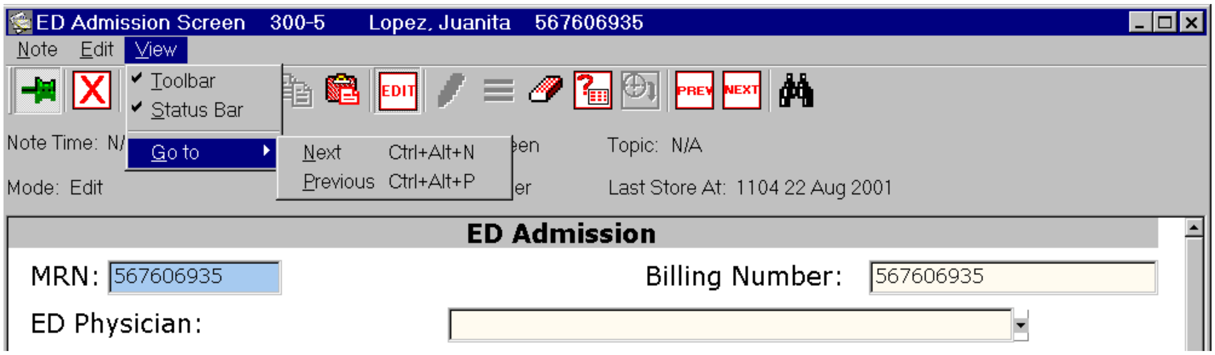
Use the **Spelling All** option to check spelling in all fields.

### *Options*

This function sets parameters for the spelling options.

## View Menu

The following edit-mode menu options are in the **View** menu of the open note.




### *Toolbar*

Click **Toolbar** to display or hide the the **Toolbar**. The **Toolbar** is the row of Icons shown above.

### *Status Bar*

Click **Status Bar** to display or hide the the **Status Bar**. The **Status Bar** is located on the bottom edge of the note screen (see the example New Note screen on page 125).

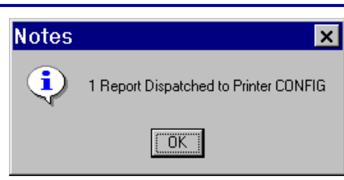
### *Go To*

- **Go to Next** opens the next note in the list of notes on the **Notes Menu Screen**.
- **Go to Previous** opens the previous note in the list of notes on the **Notes Menu Screen.**

## Print Note(s)

Use this function to print one or more notes from the **Notes Menu Screen** (see page 122).

| Step by Step | Additional Information |
|---|---|
| 1. In the **Notes Menu Screen** select a note to print. | Hold down the **Shift** key to select two or more notes for printing. |
| 2. Select **Print Note(s)** from the **Notes Actions** menu (see page 123). | The **Validation Dialog** box appears. |
| 3. Enter your User ID and Password and click **OK**. | The **Notes** pop-up box appears. |
| 4. Select **OK** to confirm the print request or click the x-box to cancel. | |



### Day

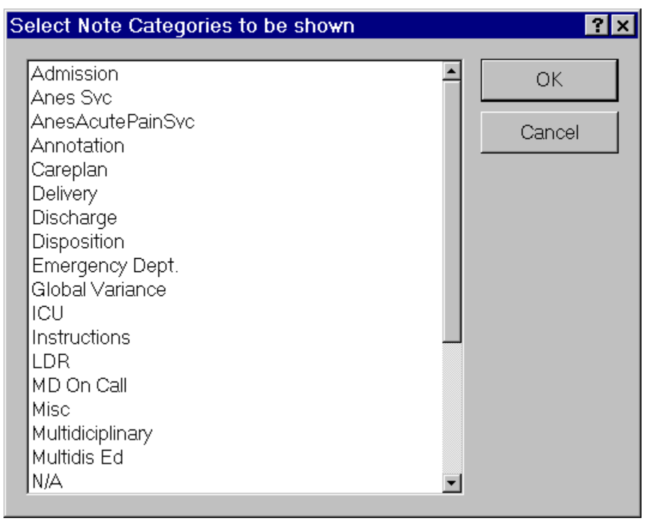
The Notes display is categorized into days. You can navigate through notes of different periods by selecting **Day** from the **Notes Actions** menu. Select any of the following Day-options:

- **Next Day** - Shows notes for the day succeeding the one currently displayed on the screen.
- **Previous Day** - Displays notes for the day previous to the one currently displayed on the screen.
- **Select a day** - Displays notes for the selected day.
- **All/Day notes -** Displays all notes for the selected patient.

### Category

You can also view Notes by category. A category can contain one or more Note types. Use the following steps to select a category:

| Step by Step | Additional Information |
|---|---|
| 1. Select **Category** from the **Notes Actions** menu. | The system displays a choicelist of available Notes categories. |
| 2. Select one or more categories to view. | |
| 3. Select **OK**. | Notes of the selected category or categories are displayed. |



## Copy Note

A note can be used to create an identical new note using the **Copy Note** feature. Use the following steps to copy a note:

> Note: *The **Copy Note** feature does **not** apply to **Untimed Notes** and **Annotations**.*

| Step by Step | Additional Information |
| --- | --- |
| 1. Select **Copy Note** from the **Notes Actions** menu. | You are prompted to select the date and time for the new note. |
| 2. Select the date and time from the displayed calendar and time fields. | A new note is created using the copied note. You can edit fields and store the new note in the preferred format. |
| 3. Select **OK**. | |

## Navigating with Tabstops

Some Note Types have prompt boxes that contain a **Tabstop** marker. The Tabstop is useful for navigating lengthy notes and sectioned notes. A Tabstop marker is placed in the first prompt box of a section or topic. To navigate through the note, press the **Crtl+Tab** keys to tab to the next Tabstop marker. Continue tabbing until you reach the topic of interest. The **Tabstop** markers are set up in the Note Template. Refer to the *Note Template Tutorial* (250-51011) for instructions.

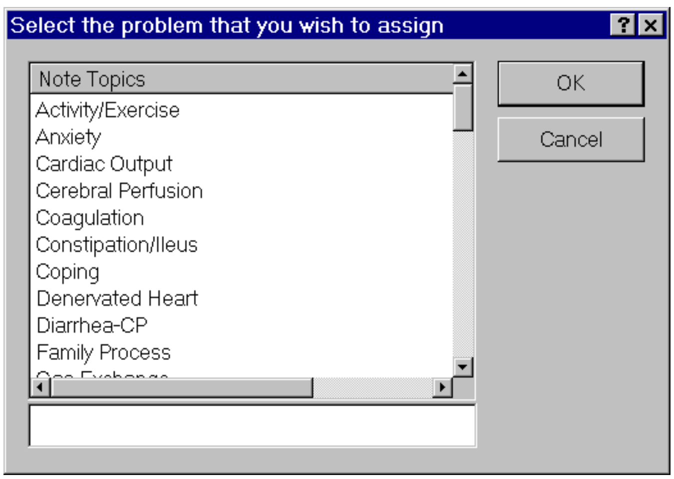
## Care Plans

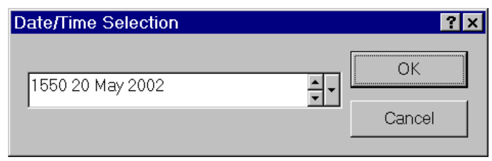
Care Plans are preconfigured nursing guidelines, which can be tailored to the needs of a particular patient. When you enter the **Care Plan** function, the **Active Problems** window is the default display. You can toggle to view **All Problems** by selecting the **All/Active Problems** option in the **Careplan** menu. Use the **Careplan** menu to assign and update Care Plan problems.

### Assigning a New Problem

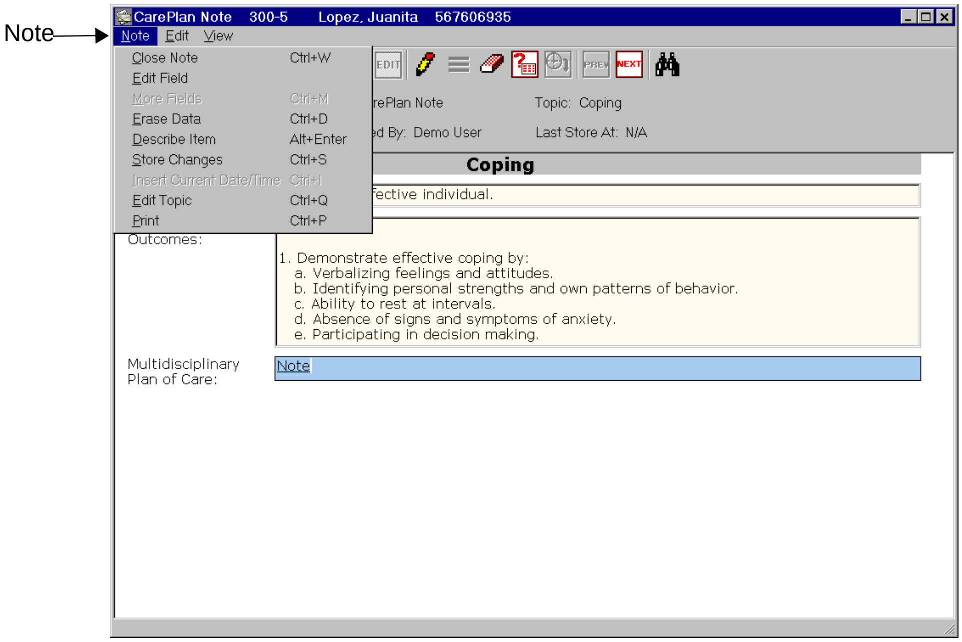
Use the following steps to assign a new problem:

| Step by Step | Additional Information |
|---|---|
| 1. Access Notes for the selected patient. | |
| 2. Select **Assign Problem** from the **Careplan** menu. | The **Notes Topics** window appears. |
| 3. Select a problem topic and click **OK**. | The **Date/Time Selection** window appears. |




| Step by Step | Additional Information |
|---|---|
| 4. Select a date and time for the new problem in the **Date/Time Selection** window and select **OK**. | A preconfigured **CarePlan Note** window is displayed. The window includes a notes-type menu bar for editing the Care Plan as needed. |
| 5. Edit the note and select **Store Changes** from the **Note** menu. | The **Validation Dialog** window appears. |
| 6. Enter your User ID and Password and click **OK**. | |
| 7. Select **Close Note** from the Care Plan **Note** menu to exit the care plan note. | The new care plan is displayed in the Care Plan section of the **Notes Menu Screen**. |




## Updating a Problem

An existing problem can be copied and edited using the **Update Problem** menu option. Use the following steps to update a Care Plan problem:

| Step by Step | Additional Information |
|---|---|
| 1. From the **Notes Menu Screen**, select a problem from the Care Plan problem list. | |
| 2. Select **Update Problem** from the **Careplan** menu. | The **Validation Dialog** window appears. |
| 3. Enter your User ID and Password and click **OK**. | The **Date/Time Selection** window appears. |
| 4. Select a date and time for the problem update in the **Date/Time Selection** window and select **OK**. | The selected **Care Plan Note** opens for editing. |
| 5. Edit the note and select **Store Changes** from the **Note** menu. | The **Validation Dialog** window appears. |
| 6. Enter your User ID and Password and click **OK**. | |
| 7. Select **Close Note** from the **Note** menu. | The modified note closes. |

### Showing Status

Use the **Show Status** menu option to view the edit history, if any, of the selected problem in the form of a series of notes. Use the following steps to show the status:

| Step by Step | Additional Information |
|---|---|
| 1. Select a Care Plan problem from the displayed list. | |
| 2. Select **Show Status** from the **Careplan** menu. | The selected problem is displayed. If the **Previous** and/or **Next** Icons are active, you can view the respective Care Plan changes. |
| 3. Select **Close Note** from the **Note** menu to close the note. | |

### Resolving a Problem

The status of the problem can be changed from Active to Resolved. After a care plan is resolved, it cannot be updated. Use the following steps to resolve an existing problem:

| Step by Step | Additional Information |
|---|---|
| 1. From the **Notes Menu Screen**, select a problem from the Care Plan problem list. | |
| 2. Select **Resolve Problem** from the **Careplan** menu. | The **Validation Dialog** window appears. |
| 3. Enter your User Name and Password in the **Validation Dialog** window and select **OK**. | The **Date/Time Selection** window appears. |
| 4. Select a date and time for the problem resolution in the **Date/Time Selection** window and select **OK**. | The Care Plan note disappears from the Active Problems list. It can be viewed from the All Problems list. |

# Fetal Plots

7

This section introduces the Fetal Plot screens in Essentris, which are used in maternal charting. A fetal plot screen is a facsimile of the fetal trace produced at the patient's bedside. Fetal plots can also display the heart rates of twins. Fetal plots are also referred to as fetal strips.

Fetal plots include the following features:

- View real-time fetal plots
- Specify a time to view the related section of the fetal plot
- Create customized fetal plots
- Add annotations

A fetal plot is a graphical recording of a patient's uterine activity and the fetal's heart rate. The fetal monitor begins displaying fetal data when the patient is connected to the monitor. The fetal monitor begins recording fetal data when the patient is admitted into Essentris. The recorded fetal plot is stored in the patient record. Fetal records cease when the patient is disconnected from the monitor.

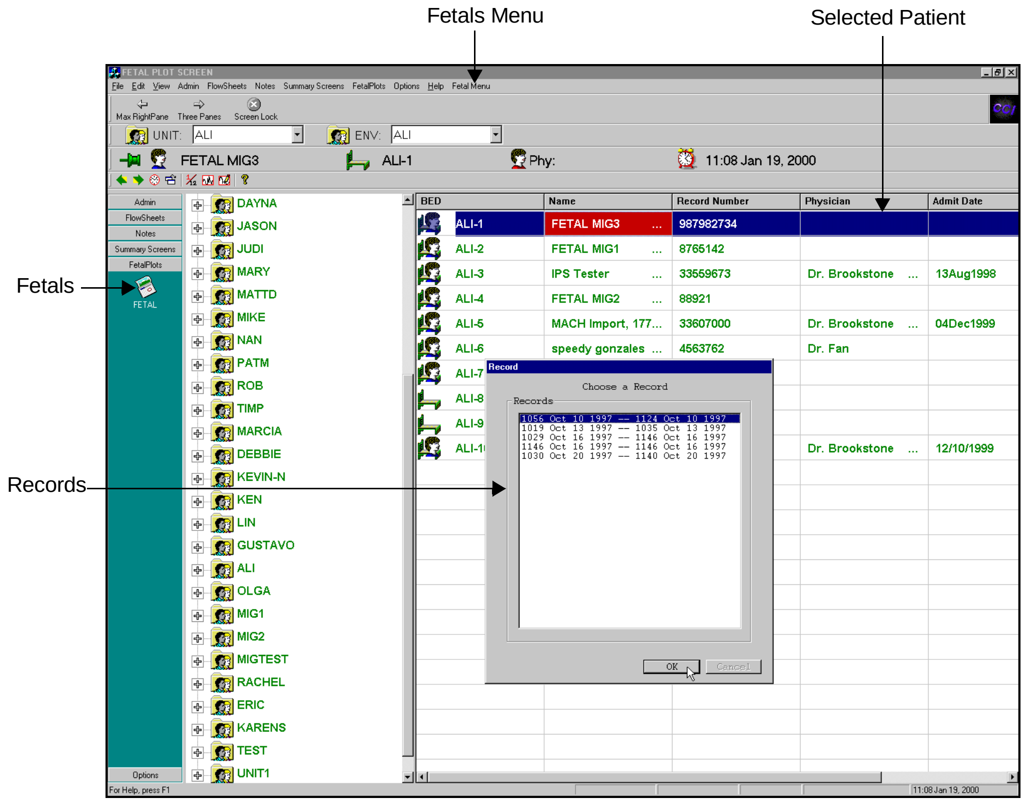
Fetal plots are configured to the requirements of each hospital and each unit within a hospital. Note that all traces in fetal plots are scaled and therefore, not identical to their bedside counterparts.

## Accessing Fetal Plots

A fetal plot for a particular patient can be accessed from the Essentris menu or from the application toolbar. Use the following steps to access fetal plots:

1. In the **Patient Control** screen, select a patient.
2. Select **Fetal Strip** from the **FetalPlots** tab in the Essentris application toolbar, from the **FetalPlots** pull-down menu, or from the shortcut menu.

   If the patient is connected to the fetal monitor, the patient's fetal plot is displayed on the **Fetal Plot Screen**; otherwise, the **Record** choicelist of stored fetal plots is displayed.
3. If the **Record** choicelist window is displayed, select a fetal record from the choicelist and click **OK**. The **Fetal Plot Screen** is displayed showing the selected fetal record.

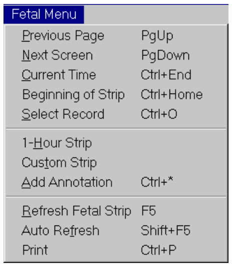

Fetals Menu
Selected Patient
Fetals
Records
FETAL PLOT SCREEN
FETAL MIG3
ALI-1
11:08 Jan 19, 2000
Choose a Record


Fetal Heart Rate
Uterine Activity
Annotation List
Enter End Time
FETAL PLOT SCREEN
FETAL MIG3
ALI-1
11:09 Jan 19, 2000
Enter end time:
Annotations

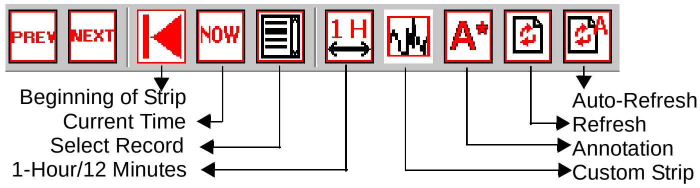
# Fetal Plot Screen Functions

The following functions are menu items from the **Fetal Menu** and/or the Icon tool bar.

Fetal Menu




Fetal Icons




## Previous Page/Next Screen

When the **Fetal Plot Screen** displays a partial view of a fetal plot, view other parts of the fetal plot using the **Previous Page** or **Next Screen** menu items, the **Prev** or **Next** icons, or the **Page Up** or **Page Down** keys on the keyboard.

## Current Time

The current data for a fetal plot can be viewed for the selected patient at any time using the **Current Time** menu option or the **Now** icon. The fetal plot displays the current data and time.

## Beginning of Strip

To view the beginning of a fetal strip, select **Beginning of Strip** (Ctrl+Home). The beginning of the strip is shown in the left side of the fetal plot display. **Auto Refresh** is automatically turned off, except when the complete fetal strip is displayed on one screen.

## Select Record

Use the following steps to select a stored fetal plot record:

1. Choose **Select Record**. The **Record** window appears, which shows the stored fetal plot records for the current patient, including the ending time for each fetal plot.
2. Select a fetal plot record and click **OK**. The selected fetal plot is displayed.

## 1-Hour Strip

Use the **1-Hour Strip** option to toggle between the default 12-minute fetal plot display and a one-hour fetal plot display. The end time for the displayed fetal plot remains unchanged.

The current plot is replaced by a one-hour plot with the same end time. To revert back to the default display, use the **12-Min Strip** menu option or the **1-Hour/12 Minute** icon.

## Custom Strip

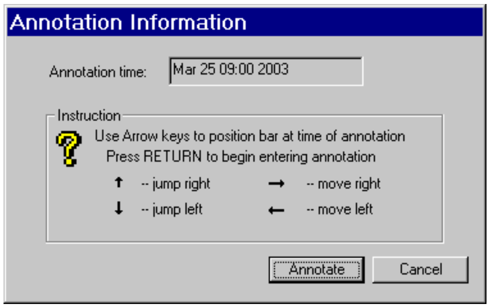
Fetal plots default to 12-minute intervals. You can define custom time intervals for fetal plots using the **Custom Strip** option. Use the following steps to define a custom plot:

1. Select **Custom Strip**. The system displays the **Custom Strip** dialog box, prompting for a plot length. Enter the time interval in minutes.
2. Select **OK**. A Non-Standard Strip Length warning is displayed. A fetal plot using the new time interval is displayed.

## Add Annotation

Textual notes or Annotations can be attached at different times to a fetal plot. Stored annotations are displayed on screen in the **Annotations** window. An annotation marker shows under the fetal plot, at the selected time, as an alphabetic character in a small box. Use the following steps to add an annotation to a fetal plot:

1. Select **Add Annotation**. The **Annotation Information** window is displayed to select a time for the annotation.




2. Select an annotation time using the arrow keys.
3. Click the **Annotate** button. The **Annotation** window is displayed.
4. Select from the displayed choices using a double click, or manually enter free text in the field provided.
5. Select **Store**. The **Validation Dialog** window is displayed.
6. Enter your User Name and Password.
7. Select **OK**. The annotation is now displayed in the **Annotations** window. It is also assigned an alphabetic character, which is displayed in the fetal plot at the selected time.

## Refresh Fetal Strip

Use the **Refresh** option to manually step through the fetal plot at a self-directed pace. The **Auto Refresh** option should be toggled off while using the **Refresh** option. The **Auto Refresh** feature is *not* used with stored fetal plots.

## Auto Refresh

**Auto Refresh** re-displays the fetal plot every four seconds while new data is received from the bedside monitor. For a live fetal strip, Auto Refresh begins when the fetal strip application is started. If the strip is *not* live when the application is started, the **Auto Refresh** option must be selected to start it.

It can be toggled on or off as needed by selecting the option. It is on when a check mark is displayed next to the option in the **Fetal Menu**. If there is no new data, the icon is greyed out and cannot be selected. The refresh time interval can be configured by CliniComp Client Services. The default refresh time interval is four seconds. This feature is *not* used with stored fetal plots.

### Print

Use the following steps to print the currently displayed fetal plot using the **Fetal Menu**:

1. Select the **Print** option on the **Fetal Menu**. The **Print Date/Time** window appears.
2. To print the fetal plot using a different date and time range than the display, enter the required date and/or time in the Start Time and/or End Time text boxes.
3. Use the arrow keys in the date/time boxes or the arrow keys on the keyboard to change the date and/or time.

Optionally, in place of the **Print** option on the **Fetal Menu,** use the **Print Chart** option in the **Tools** menu on the Patient Control screen. See “Printing Charts” on page 151.

### Enter End Time

This function is located under the fetal plot on the **Fetal Plot Screen**.

Use the **Enter End Time** box to change the end time for the displayed fetal plot. Use the following steps to change the end time:

1. Place the cursor in the **Enter End Time** text box on the fetal plot screen.
2. Select the time, month, and year for the end time using the arrow buttons in the text box or the arrow keys on the keyboard.
3. Select **Enter**. The corresponding fetal plot is displayed.

### Display Patient Name

The Fetal Monitor Remote Display (FMRD) can optionally display the patient name. Patient names can be hidden or displayed individually or globally. To configure this option, contact CliniComp Client Services.

# Newborn Growth Charts

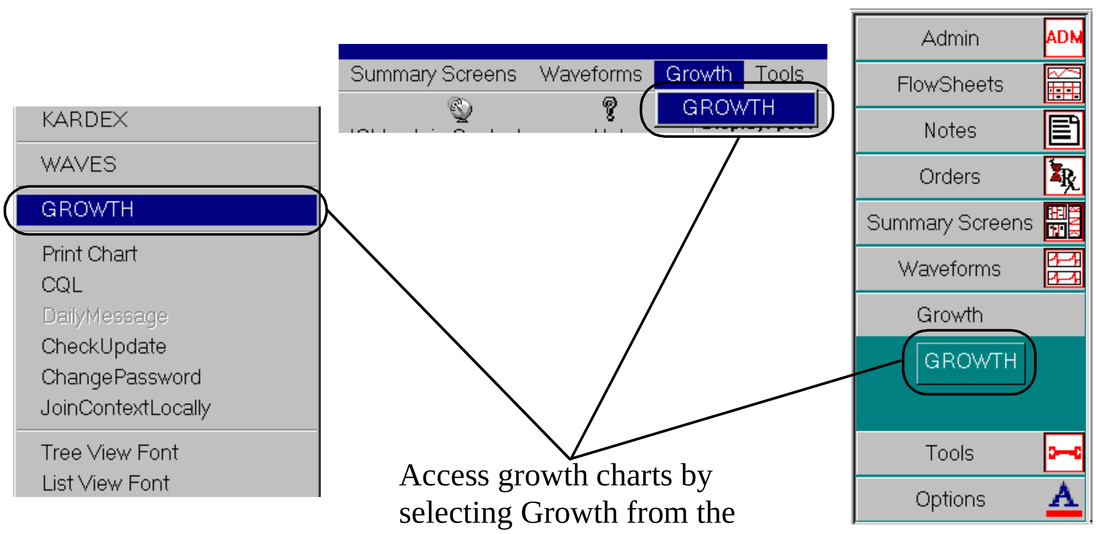
8

Growth charts consist of a series of percentile curves that illustrate the distribution of selected body measurements in U.S. infants. Data charted in babies' medical records are graphed onto the growth charts for comparison with large population studies. For additional information on growth charts, please refer to the CDC's National Center for Health Statistics website (http://www.cdc.gov/growthcharts/).

Growth charts are not intended to be used as a sole diagnostic instrument. Instead, growth charts are tools that contribute to forming an overall clinical impression for the child being measured.

## Accessing Growth Charts

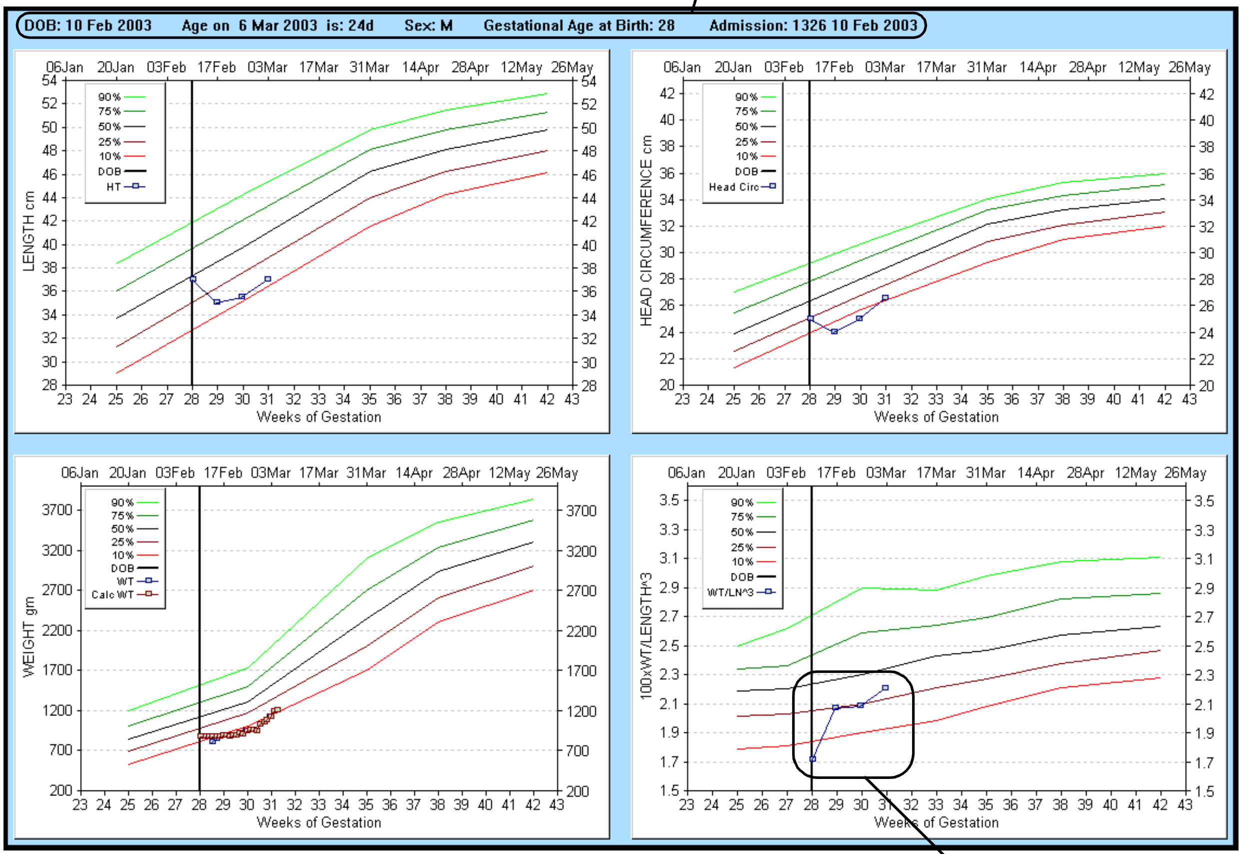
To access a newborn's growth charts, select the patient record and then select **Growth** from the Application Bar, the Menu Bar, or as a choice on the Patient Control Shortcut Menu.




Access growth charts by selecting Growth from the Application Bar, Menu Bar, or Patient Control Shortcut.

## Sample Growth Chart Screen

Patient information




Patient Data

Data stored to the following database items appear on the charts:

HEIGHT
WEIGHT
CALCULATION WEIGHT
OccipitalFrontalCirc.calc

The weight to length calculation is computed as:

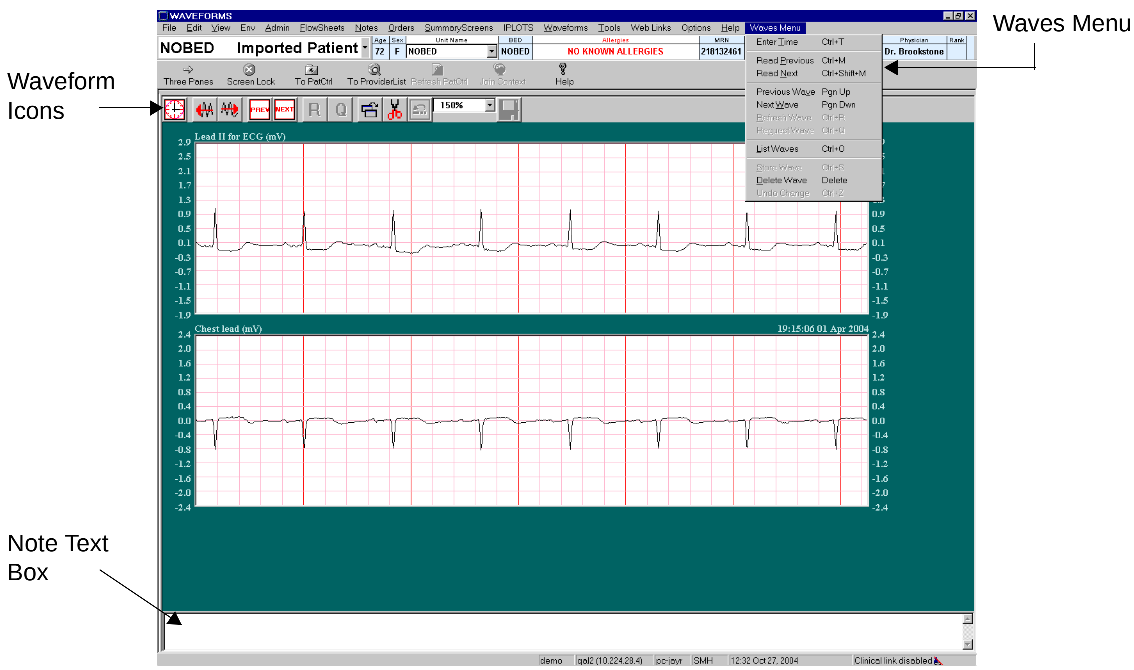
$$\frac{100 \text{ x } WEIGHT}{HEIGHT}$$

# Waveforms

Waveforms are graphical displays of various monitored parameters, such as Pulmonary Artery Pressure (PAP), Arterial Blood Pressure (ABP), and Cardio-Respirogram (CRG). Waveforms are selectively saved in the patient record, and annotations can be included with the patient's waveforms. **Note:** It is strongly recommended that the bedside monitor be used when making medical decisions.

## Displaying Waveforms

To display a patient's waveforms, select a patient in the Patient Control window. On the menu bar, open the Waveforms menu and select Waves to display the patient's waveforms.




There are two sources of waveforms: the patient bedside monitors, and previously stored waveforms. When the Waveforms screen opens, it displays waveforms from the patient bedside monitors, if the patient is being monitored. Otherwise, the screen displays a stored waveform. Use the following tools to view, store, change, or delete waveforms.

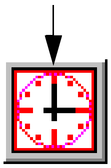
## Patient-Monitor Waveforms

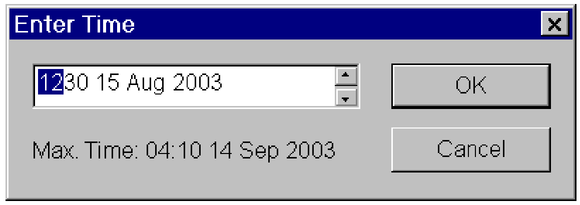
A waveform is displayed on the bedside monitor for each monitor lead connected to the patient. Use the following functions for the patient-monitor waveforms.

### Enter Time

Use **Enter Time** to set the start time for recording the waveforms of the monitored patient. To display the **Enter Time** dialog box, click the **Enter Time** icon or click the menu item on the Waves Menu.

Enter Time Icon





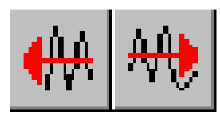

To set the time and date, use the up and down arrows in the **Enter Time** dialog box, or on the keyboard, to set the individual fields of the time and date. After setting the hour, use the right arrow on the keyboard to select the minutes. Set the minutes and continue with the same process to set the date fields. Click the **OK** button when you are finished.

**Max. Time** shows the end time and date for the maximum amount of recording time for this patient's waveforms.

### Read Previous/Read Next

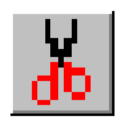
**Note:** These functions are active when the continuous waveform option is configured on. They are greyed-out when the non-continuous waveform option is configured on.

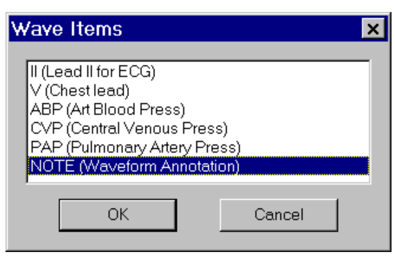
These functions move the waveform forward or back by the length of the display. The display is shown in seconds. Contact CliniComp Client Services to change the number of seconds displayed. Click the **Read Previous** or **Read Next** icons or click the menu items in the Waves Menu to move the waveform.



### Delete Wave

Use **Delete Wave** to remove a single waveform or note from your display of waveforms monitoring a patient. Note that this action does *not* remove the waveform from the bedside monitor. Click on the **Delete Wave** icon or click the menu item on the Waves Menu. The **Wave Items** window appears. Select the waveform to be removed and click **OK**.

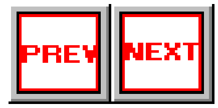





## Stored Waveforms

Stored waveforms are written to the patient's record.

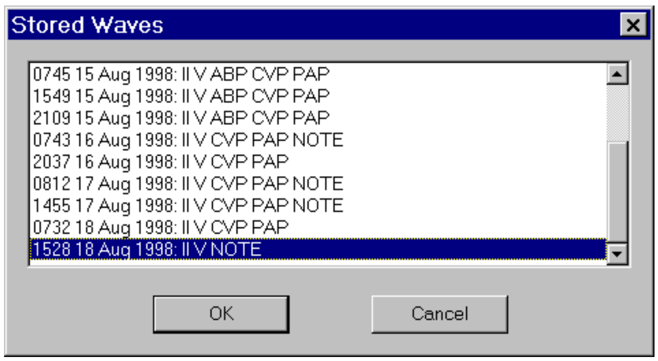
### Previous Wave/Next Wave




Use these functions to display the previous or next set of stored waveforms. Use the **Previous Wave** or **Next Wave** icons or the menu items in the Waves Menu to display the previous or next set of waveforms.

### List Waves

Use the **List Waves** icon or the menu item in the Waves Menu to open the **Stored Waves** window. This window lists the stored waveforms and notes for the current patient in date order. To display any waveform or note in the list, select the waveform and click **OK**. Click **Cancel** to close the window.

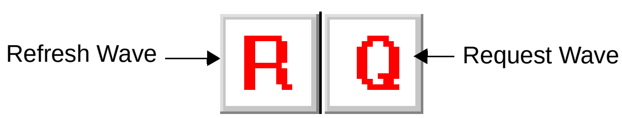



## Stored and Monitored Waveforms

The following topics apply to both patient-monitored waveforms and stored waveforms.

### Refresh Wave

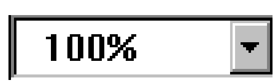
Use this icon to display all available waveforms. **Note:** This function is active when the non-continuous waveform feature is configured on. It is greyed-out when the continuous waveform feature is configured on.




### Request Wave

Use this icon to display a list of all available waveforms, from which waveforms are selected for display. **Note:** This function is active when the non-continuous waveform feature is configured on. It is greyed-out when the continuous waveform feature is configured on.

### Zoom/Scale

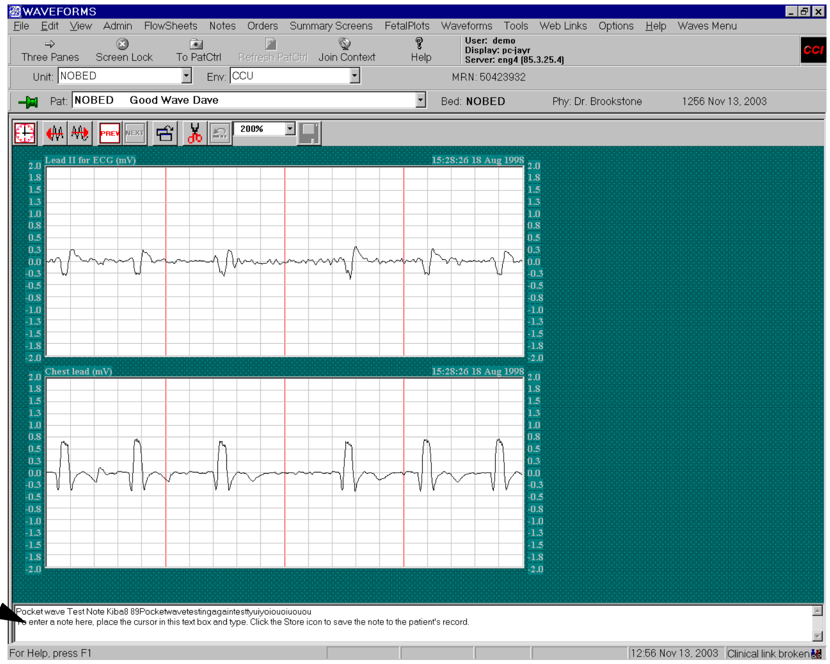



Use the zoom/scale feature to either zoom out to show more waveforms, or zoom in to show fewer waveforms. To zoom, select a scale from the drop-down list shown in the icon bar. Note that the range for the scale of each waveform, shown on both ends of each waveform, does *not* change when the display is zoomed, but the incremental values of the scale might change.

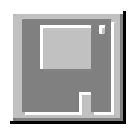
## Waveform Annotation

To enter a note for the patient, place the cursor in the note text box at the bottom of the **Waveforms** screen and type the note information. Click the **Store** icon to save the note in the patient's record.

Note Text Box

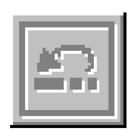



## Store Wave



Use the **Store** icon or the **Store Wave** menu item on the Waves Menu to save waveforms or a note to the patient record.

## Undo Change



Use **Undo Change** to revert the display back to the state of the display when the last **Store** was done. Click on the **Undo Change** icon or the menu item in the Waves Menu.

# Tools

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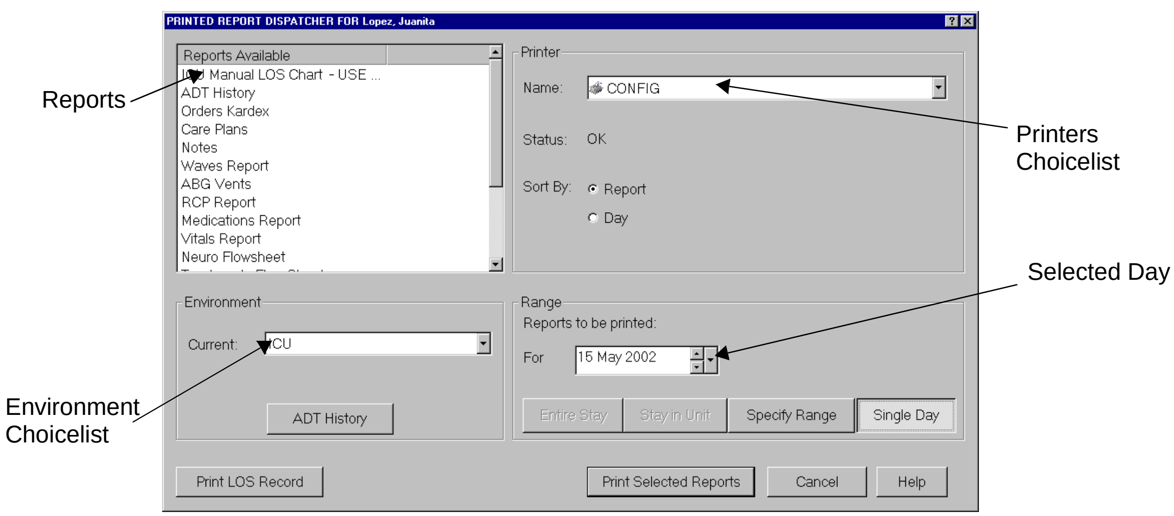
The Tools section describes the Essentris enhanced printing options; access to CQL; CheckUpdate, the automatic update feature for Essentris; and the Change Password utility.

## Printing Charts

The report printing feature in Essentris displays a variety of printing options. To use the printing features, perform the following steps:

1. Select a patient in the **Patient Control** screen.
2. Select **Print Chart** from the **Tools** pull-down menu, or from the right-click menu. The **Printed Report Dispatcher** window is displayed. Reports configured for the current environment are displayed in the **Reports Available** list.
3. Select a report or a group of reports (required).
4. Select printing options.
5. Select **Print Selected Reports**. The system prompts you for your User Name and Password.
6. Enter the required information.



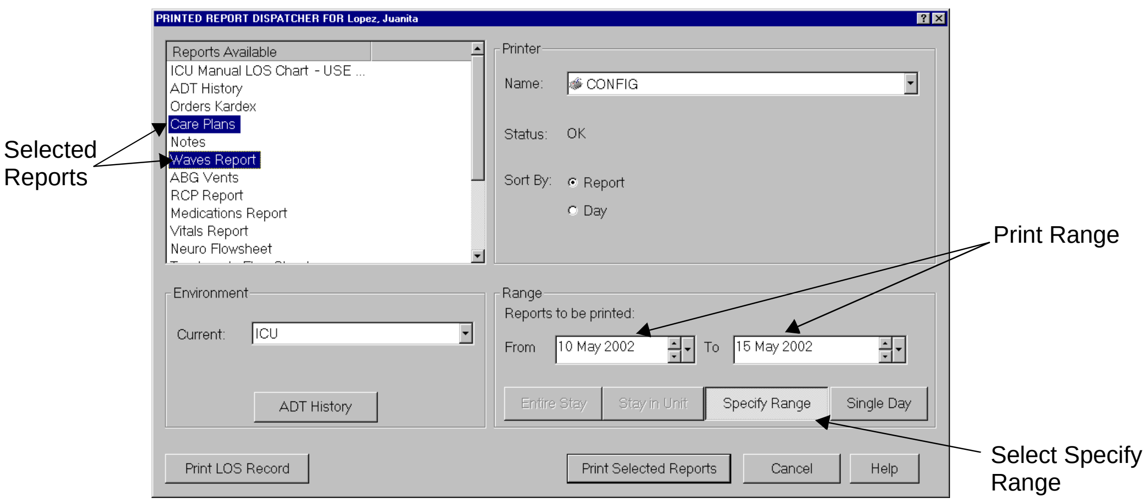
## Print Options

The following options are available in the **Printed Report Dispatcher** window.

### Specify Time

The following chronological options can be specified for printing a report:

- Print reports for a **Single Day**. Select the day using the **Reports to be printed** date selection box.
- Print reports for the **Entire Stay** of the selected patient. This selection results in the printing of patient charts by day.
- Print reports for the **Stay in Unit**, that is, for the length of time the patient was in the selected unit.
- Print reports for a specified range of days by selecting the **Specify Range** option, which displays a **To** date field.




> *In Essentris, the system defaults to the Single Day menu option with the current day selected.*

### Specify Printer

The selected reports are routed to a printer choicelist. If a printer other than the default one is selected, you are prompted for validation once every session.

### Specify Environment

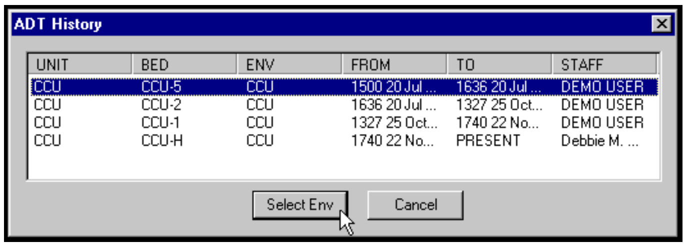
Select from the list of configured environments displayed in the **Environment** field. The selected environment's report list is displayed in the **Reports Available** list.

## Print a Length of Stay (LOS) Record

The **Print LOS Record** option prints a pre-configured group of patient records determined by the system administrator for the entire duration of a patient's stay. The charts are printed by week. As LOS Records are pre-configured, items in the **Reports Available** list should not be manually selected when the **Print LOS Record** button is selected for printing.

## View the Admit, Discharge, and Transfer (ADT) History

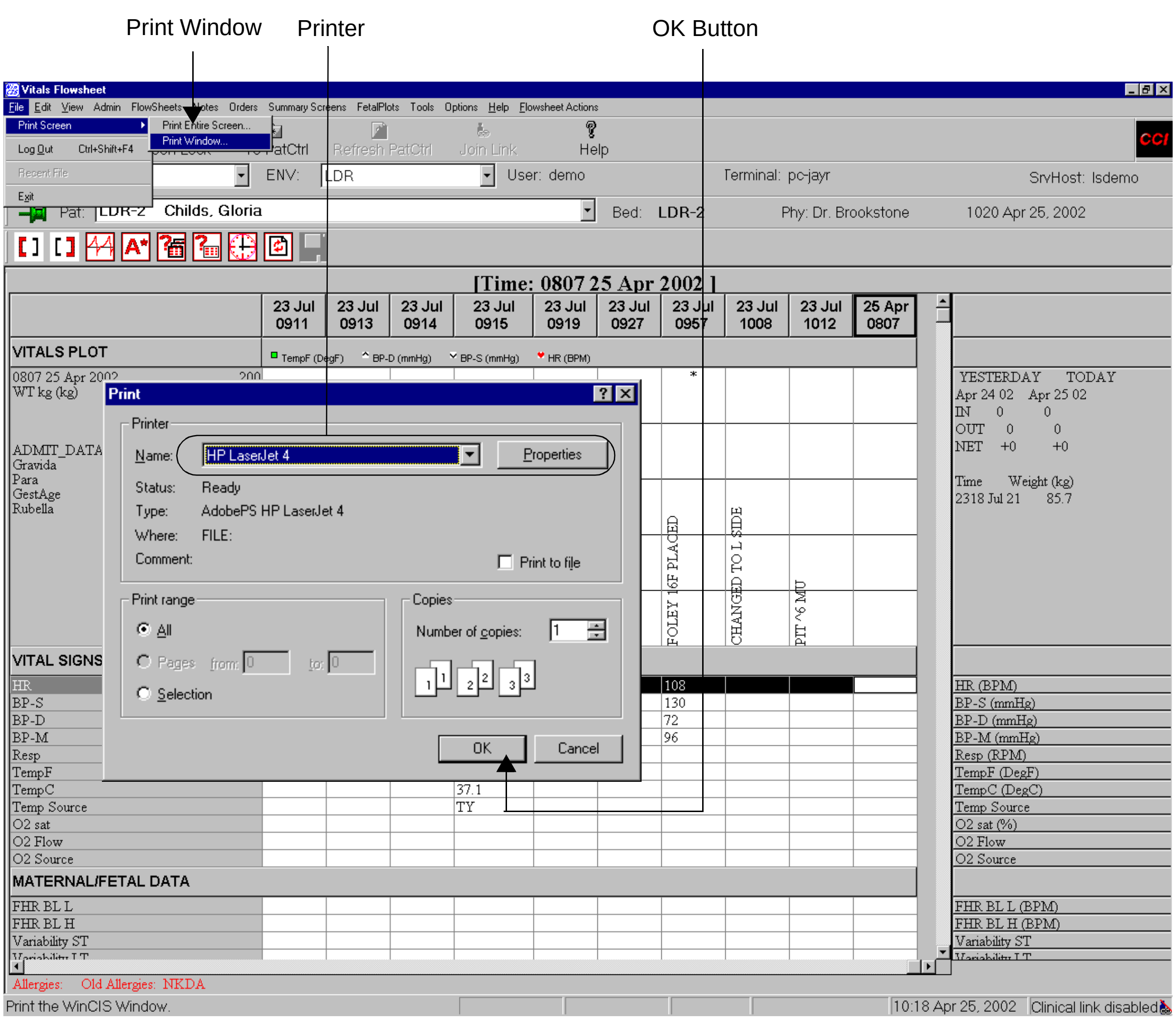
The duration of a patient's stay in each unit can be reviewed using the **ADT History** option. Review this information and select an environment from the displayed list using the **Select Env** button in the **ADT History** window. Refer to the following example.



## Print Options

Use the Print Screen feature to print the flowsheet screen.

| Step by Step | Additional Information |
|---|---|
| 1. Click **File** on the Menu Bar and select **Print Screen** > **Print Window** from the drop-down menu. | The Windows Print menu is displayed. |
| 2. Select a printer and print properties. | A default printer and print properties are automatically selected. You can select another printer and print properties from the menu. |
| 3. Click the **OK** button. | The screen is printed at the selected printer as a Bitmap image. |

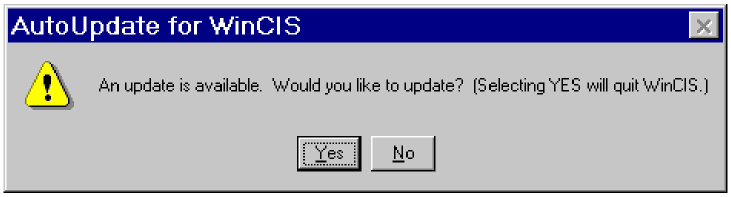


## Accessing CQL

Use the **CQL** menu item to logon to CQL. Enter your CIS user name and password to display the CQL application list.

## Using CheckUpdate

Use the **CheckUpdate** menu item to check for an available software system update to Essentris. When an update is available, you are prompted with the following message.




Note

*To execute the AutoUpdate, the feature must first be activated in the configuration file. See your System Administrator or contact CliniComp Client Services before proceeding.*

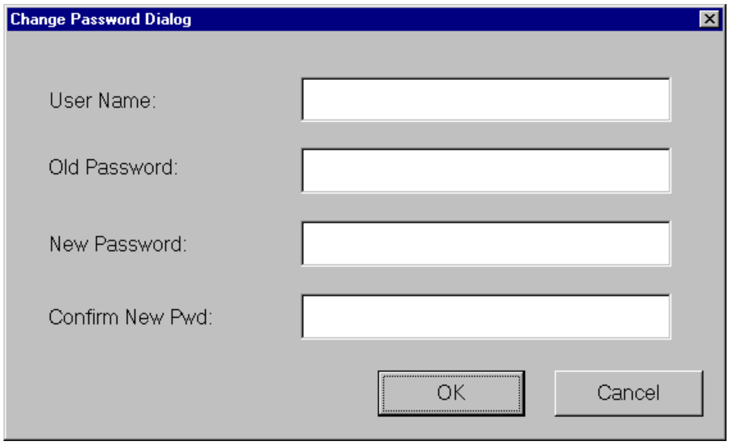
Select **Yes** to automatically exit Essentris and begin the AutoUpdate. When the update finishes, restart Essentris. The new build or version number is updated in the **About Essentris** window.

Select **No** to *not* start the AutoUpdate at this time. The following message appears.


Select **Yes** to turn off the automatic **CheckUpdate** feature, or select **No** to keep the feature active.

## Changing Your Password

Use the **ChangePassword** menu item to change your Essentris password. When the **Change Password Dialog** box appears, enter your User Name, Old Password, and New Password (twice). Press **OK** to store the new password, or press **Cancel** to abort the password change.

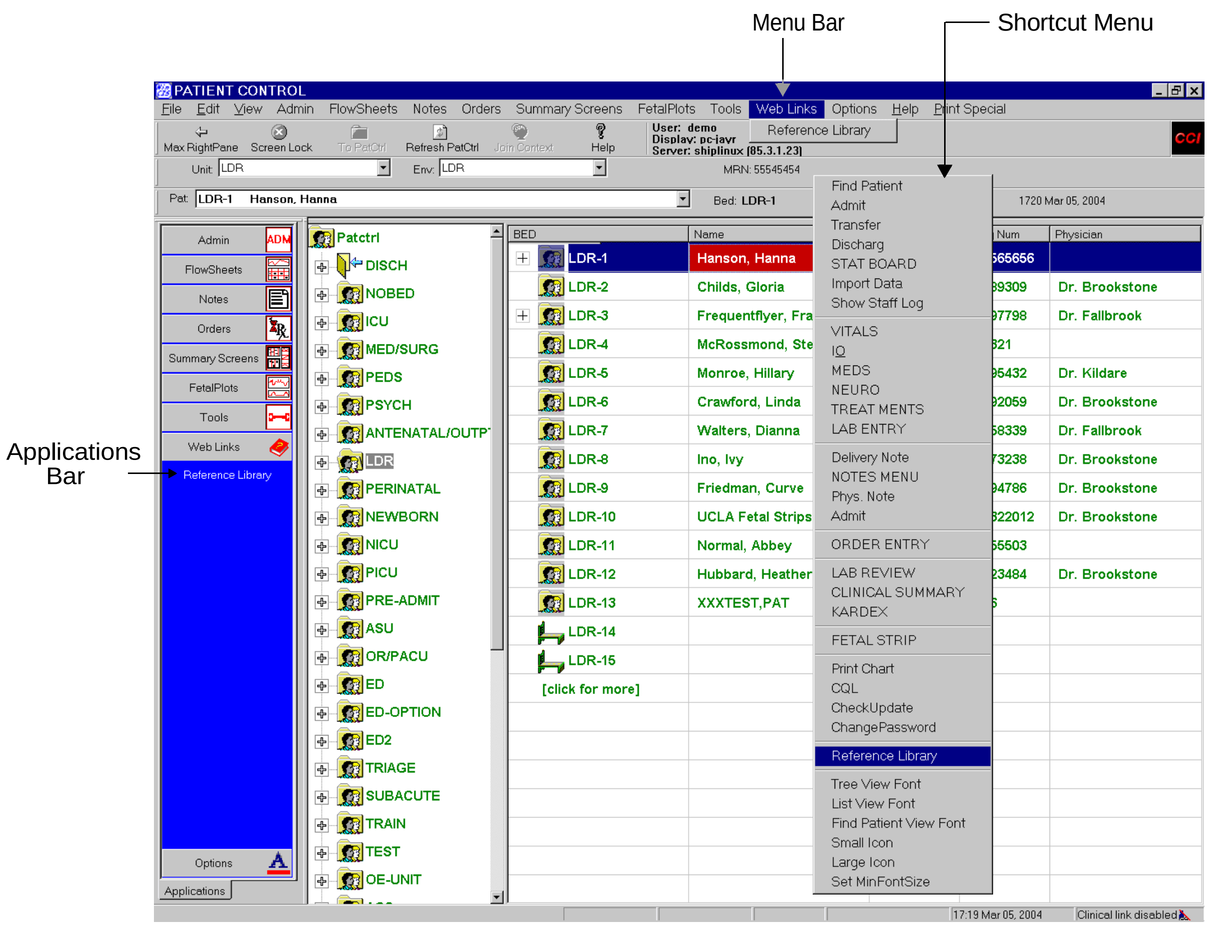


# Web Links

11

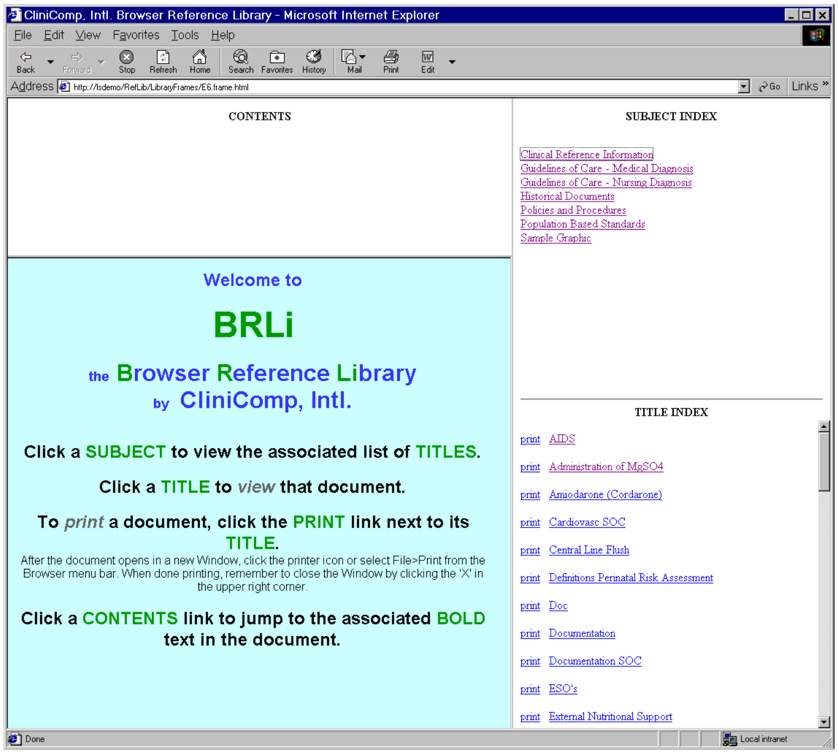
This section describes the hospital **Reference Library**. The contents of the library are determined by the hospital and can contain HTML documents, PDF formatted documents, and links to any Web site. Documents and links are categorized within a CIS environment.

Access the Reference Library from the Shortcut Menu, or the **Web Links** menu on the Applications Bar or the Menu Bar.



# Using The Reference Library

After selecting an environment in the Patient Control screen, click the **Reference Library** menu option to display the **Browser Reference Library** (**BRLi**) web page.




## Document Types

The BRLi supports a variety of document types: CIS Reference Library documents, HTML documents, and PDF documents. Word processing or publishing tool documents such as MS Word or FrameMaker can be displayed in the BRLi, if the word processing or publishing tool software resides on the computer where the document is displayed. Also, links to Web sites can be listed in the **Title Index**. Each Web site can be internal or external to the hospital.

## Displaying Documents

To display the text of a document, use the following steps:

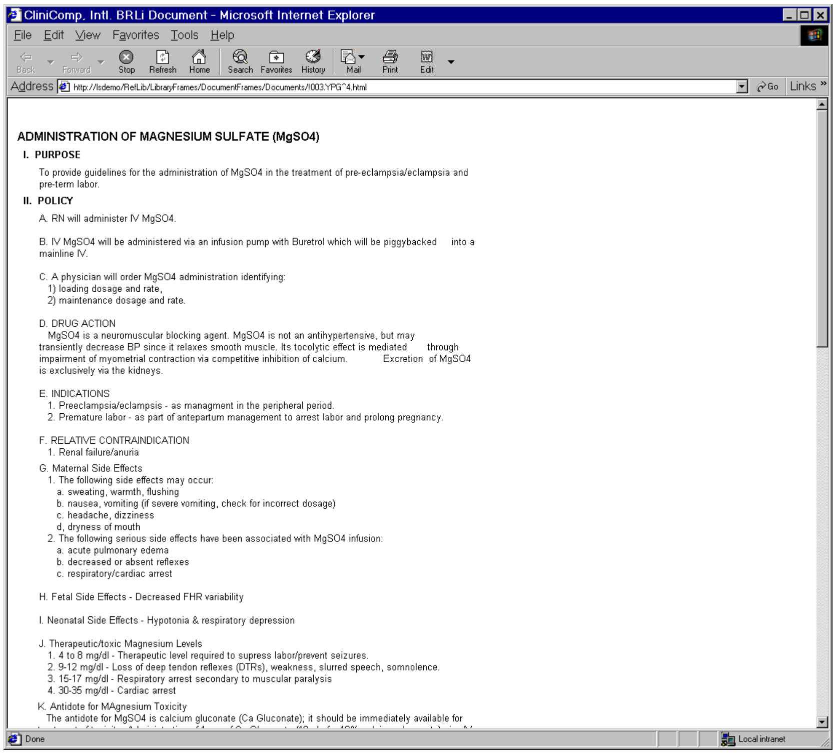
1. Select a subject in the **Subject Index**.
   The document titles for the selected subject appear in the **Title Index** frame.
2. Select a title in the **Title Index.** A separate window opens:
   - A browser window opens for CIS Reference Library documents, HTML documents, and Web site links. Some documents display a topic list in the **Contents** frame as a navigation aid.
   - PDF documents open in an Acrobat Reader window.
   - Word processing or publishing tool documents open in their respective window.

## Printing Documents

To print the text of a document from the **Title Index,** click on the document's **<u>print</u>** link, if one is shown. If a **<u>print</u>** link is not shown, click the document title. A window opens to display the text of the document, as described in Step 2 above.

For a browser window, choose one of the following print options:

- Click the **Printer** Icon in the Icon Bar.
- Open the **File** menu and click the **Print** option to display the **Print** window. In the **Print** window, select options if needed and click **OK**.



# Display Options

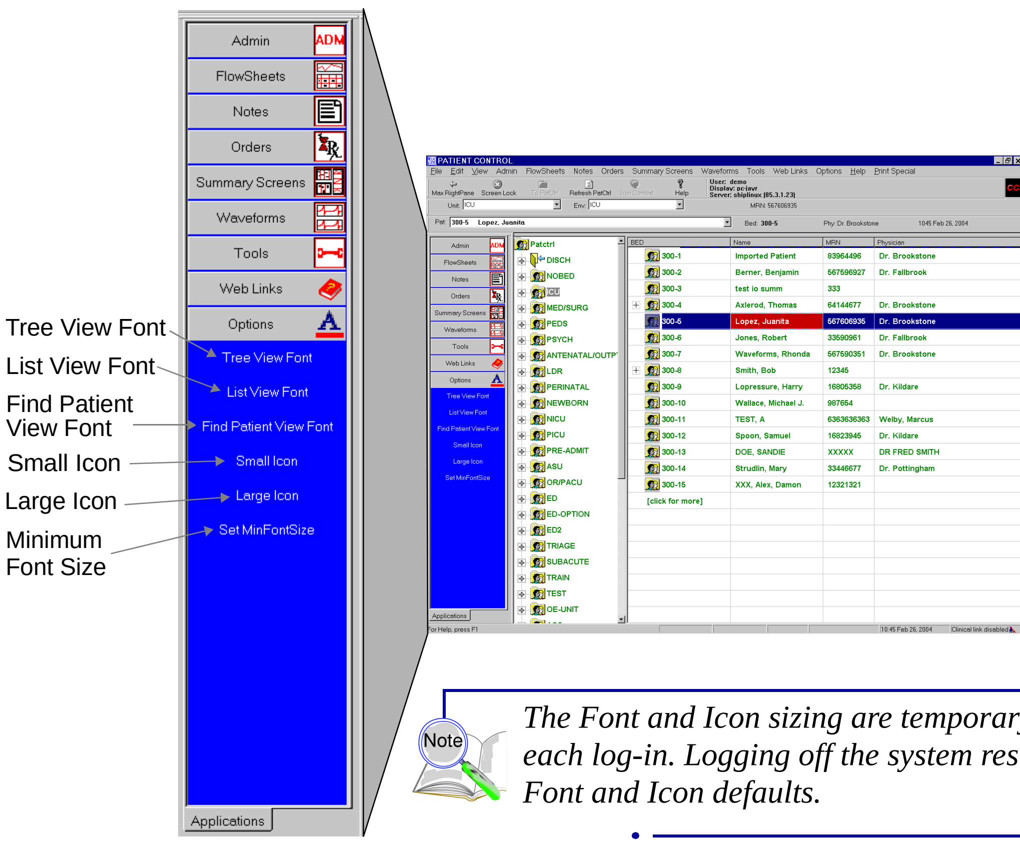
# 12

Parts of the Essentris display, specifically font and icon sizes, can be set by the user. The sections that follow describe the screen customizations and their implementation that are available in Essentris.

## Patient Control

Display options are available as a pane in the application bar and as a drop-down menu from the menu bar. As illustrated in the figure below, various options are available to change the look of fonts and icons. These options include the Tree View Font, List View Font, Find Patient View Font, Small Icon, Large Icon, and Set MinFontSize.

These options do not control the title bar in screens or pop-up windows, menu bar, or the shortcut menu. These areas are controlled by the Windows Operating System. Consult your System Administrator about changes to these areas.



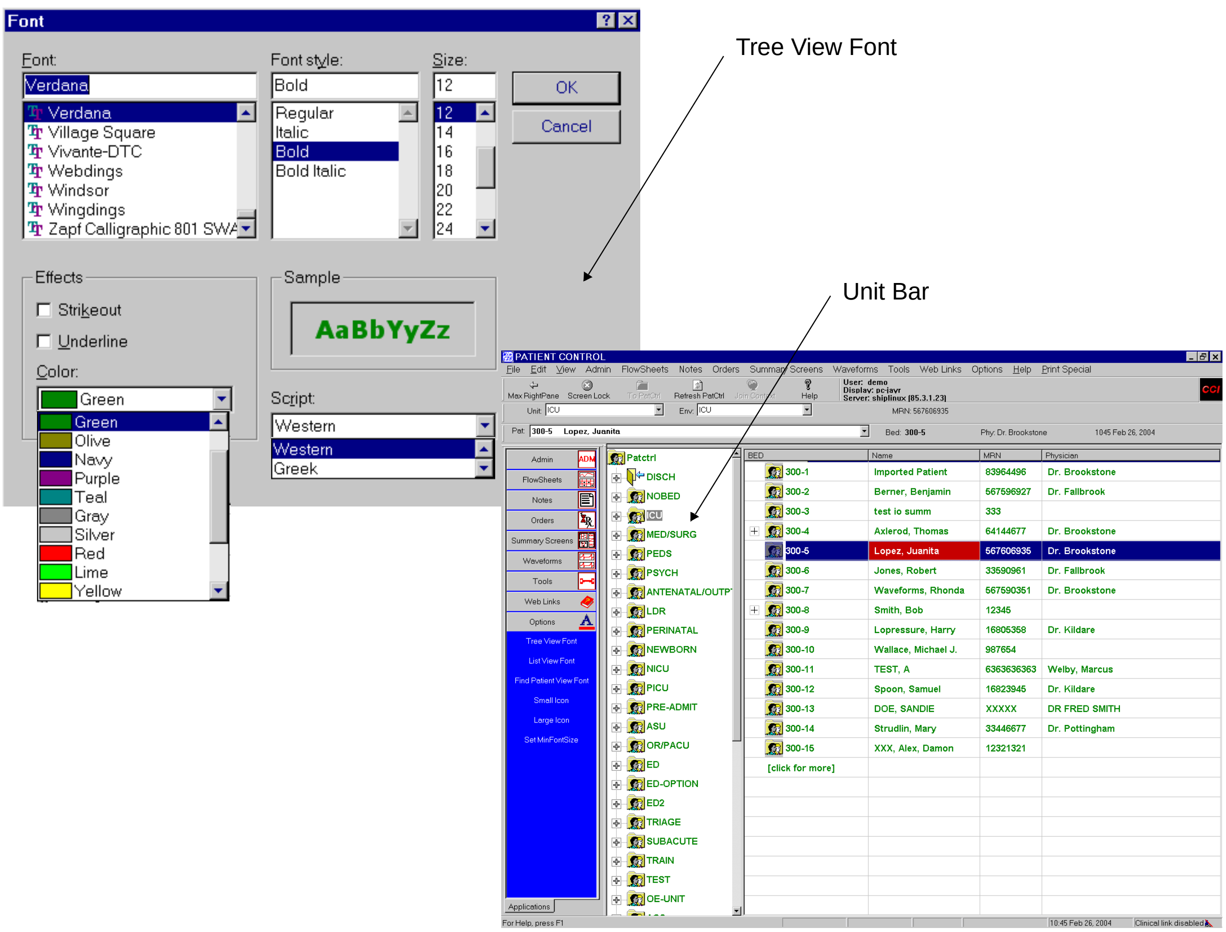

Note

*The Font and Icon sizing are temporary for each log-in. Logging off the system restores all Font and Icon defaults.*

## Unit Bar Font

Selecting **Tree View Font** opens a pop-up window used to set the font, font style, size of the font, effects (strikeout/underline), and script (Western/Greek) in the Unit Bar. To change the font in the Unit Bar, perform the following steps:

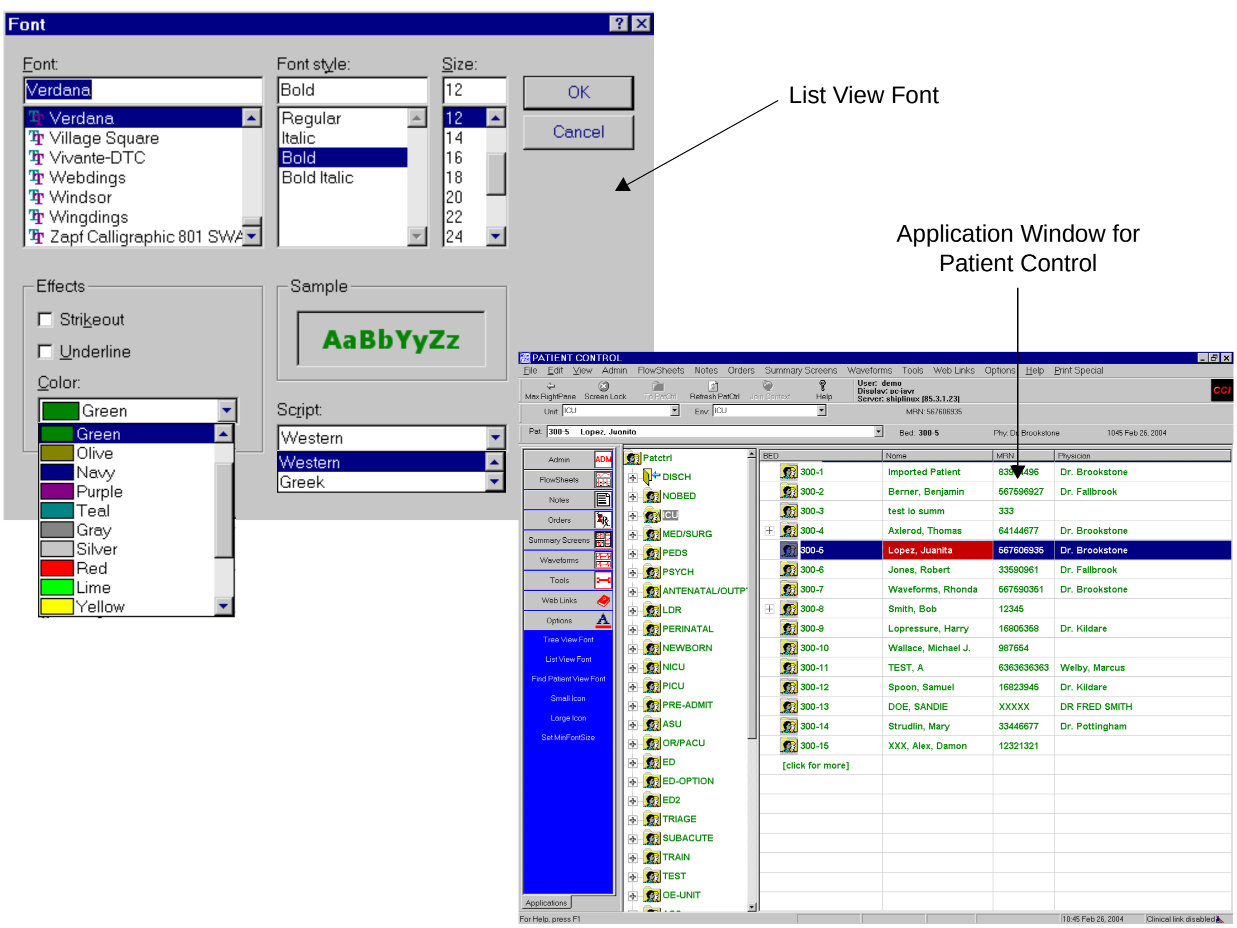
| Step by Step | Additional Information |
|---|---|
| 1. Select **Tree View Font** from the **Options** pane in the Applications Bar, or from the **Options** drop-down menu on the Menu Bar. | The **Font** window appears. |
| 2. Select the options and click the **OK** button. | The changes are applied to the Unit Bar. |



## Patient Control List Font

Selecting **List View Font** opens a pop-up window used to set the font, font style, size of the font, effects (strikeout/underline), and script (Western/Greek) in the Application Window for Patient Control. To change the font in the Application Window, perform the following steps:

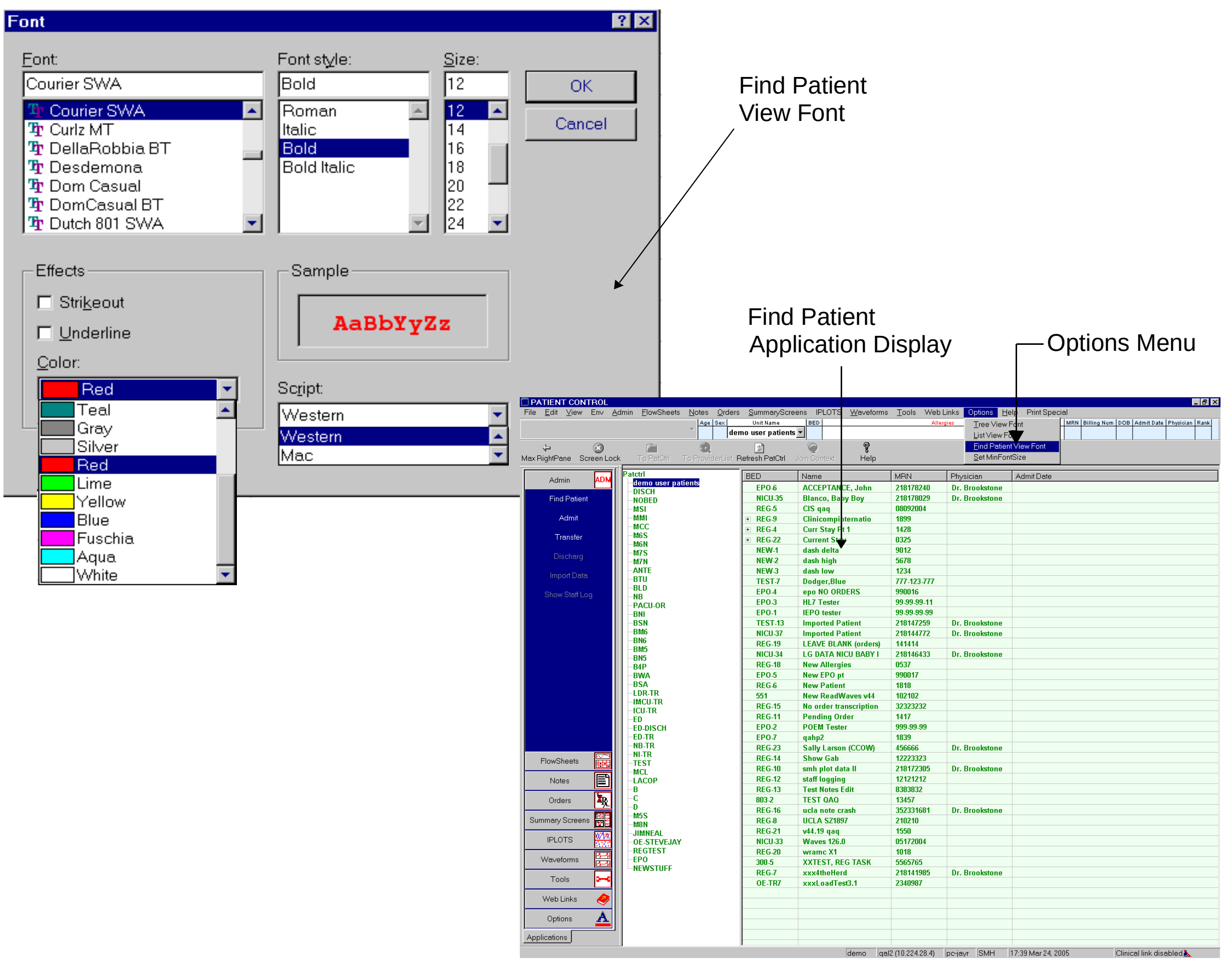
| Step by Step | Additional Information |
|---|---|
| 1. Select **List View Font** from the **Options** pane in the Applications Bar, or from the **Options** drop-down menu on the Menu Bar. | The **Font** window appears. |
| 2. Select the options and click the **OK** button. | The changes are applied to the Application Window display. |



## Find Patient View Font

Selecting **Find Patient View Font** opens a pop-up window used to set the font, font style, size of the font, effects (strikeout/underline), and script (Western/Greek) in the **Find Patient Application Display** window. To change the font in the **Find Patient** Application Display, perform the following steps:

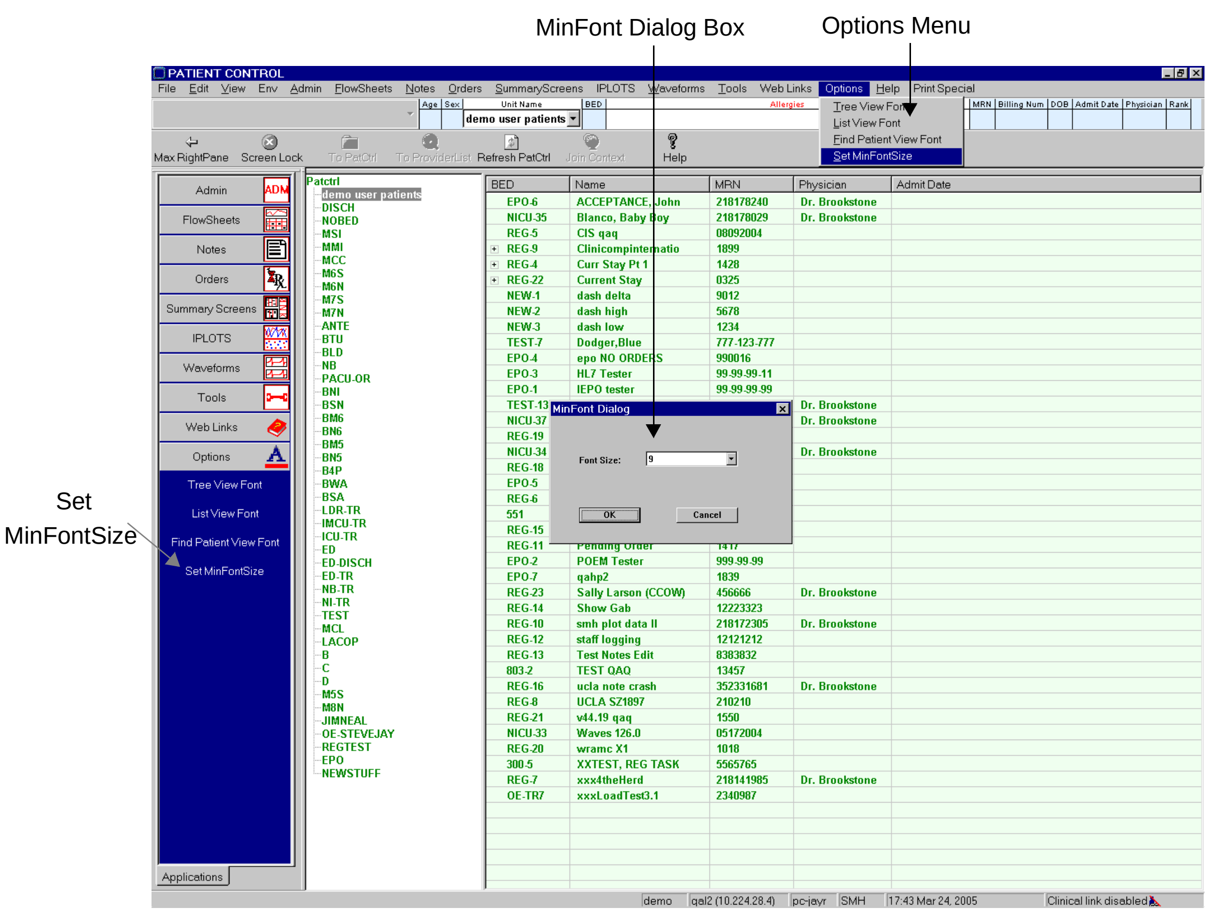
| Step by Step | Additional Information |
|---|---|
| 1. Select **Find Patient View Font** from the **Options** pane in the Applications Bar, or from the **Options** drop-down menu on the Menu Bar. | The **Font** window appears. |
| 2. Select the options and click the **OK** button. | The changes are applied to the **Find Patient** Application Display screen. |



## Set Minimum Font Size

Use the **Set MinFontSize** option to set a minimum font size. This option effects only your view of Essentris on your PC or workstation and remains in effect until you change it. The default minimum font size is 14. This option takes effect on the next login. To set a minimum font size, perform the following steps. **Note:** to use a minimum font size on a more permenant basis, contact CliniComp Client Services to configure the setting.

| Step by Step | Additional Information |
|---|---|
| 1. Click **Options** in the Application Bar or Menu Bar. | A drop-down menu appears if the menu bar is selected. |
| 2. Click on **Set MinFontSize** from the Application Bar or from the **Options** Menu. | The **MinFont** dialog box appears. |
| 3. Use the arrow button in the selection box to set the font size and click **OK**. | Fonts are changed to the selected minimum font size. Changes are applied only to your view of Essentris. |
| 4. To make changes effective immediately, exit and re-start Essentris. | |



### Summary of Effects on Display Windows

The following lists summarize the Essentris display windows and how they are effected by the **Set MinFontSize** option.

The following displays are effected by the **Set MinFontSize** option:

- **Flowsheets** - The minimum font size effects the main display. The Zoom feature is active.
- **Notes** - The minimum font size effects the main display and the Note creation and editing window.

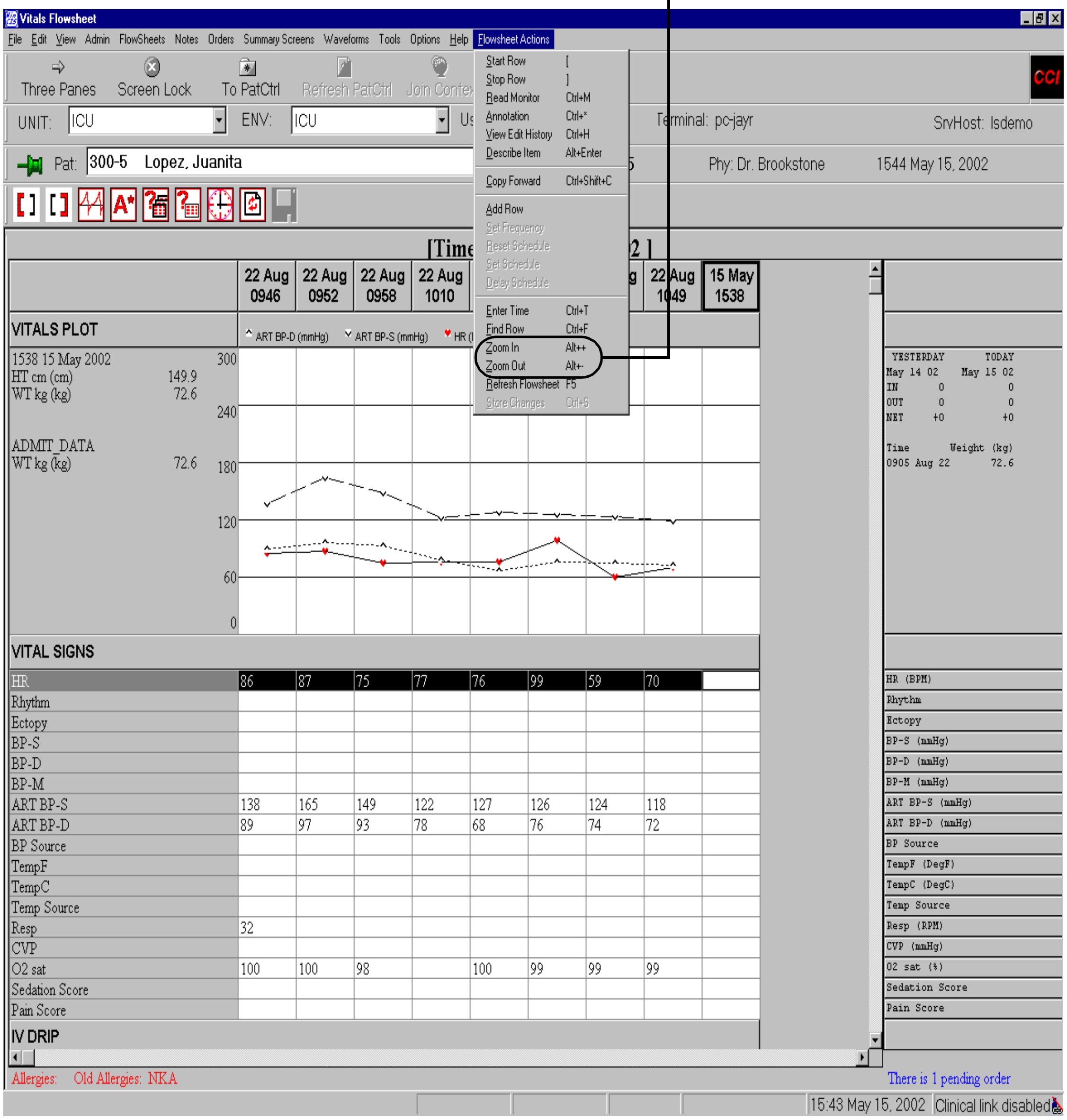
The **Set MinFontSize** option does *not* effect the following displays:

- **Admin**
- **Waveforms**

## Flowsheets

Many flowsheets are configured with a "zoom" feature to increase or decrease the size of the fonts within the flowsheet display. When **Zoom In** is selected in the **Flowsheet Actions** drop-down menu from the Menu Bar, a part of the display is magnified. Similary, when **Zoom Out** is selected, a part of the display is reduced. The part of the display that is affected by a given invocation of the zoom feature follows a cycle, such as section titles, then section data, then summary box.

Zoom In and
Zoom Out selections



# Order Entry

13

Essentris Order Entry is a permissions-driven application for placing orders, communicating orders, tracking orders, and maintaining an audit trail of orders.

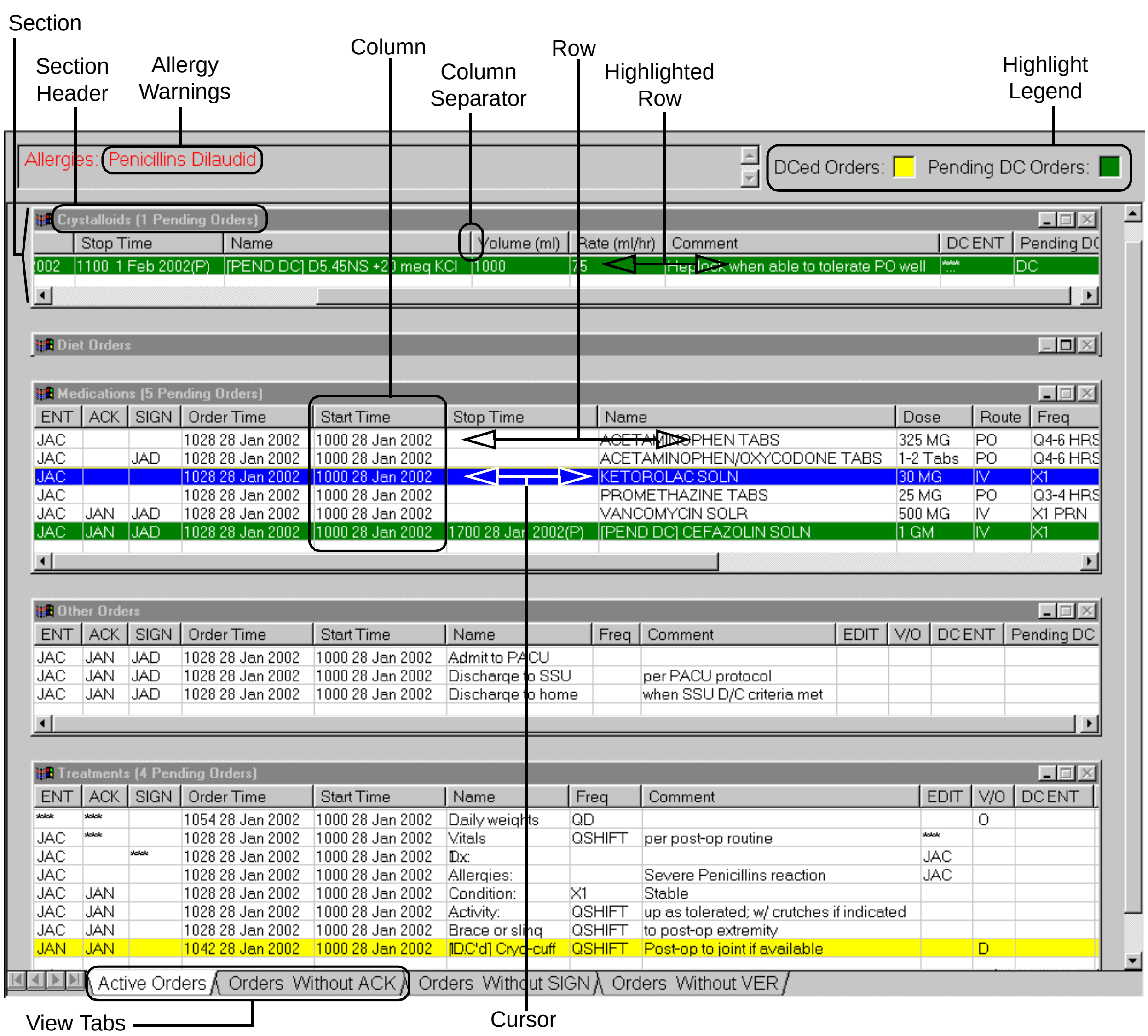



**Figure 12-1. Order Entry Application Display**

## Introduction

Essentris Order Entry has been designed to facilitate placing orders, communicating orders, and for recording the details of order authorization and delivery. It has also been designed to provide a user-friendly display for each care-giver that needs to review and process orders.

This chapter is organized as follows:

- Order Entry concepts are described in detail.
- The Order Entry Application Display is described and methods for manipulating it are presented.
- Order Entry actions are covered.
- Lastly, some examples are presented to further illustrate how to use Order Entry.

## Accessing Order Entry

Order Entry can be accessed from the Application Bar or Menu Bar. To access Order Entry, a patient must be selected and the active unit must be an Order Entry unit.

Look for the Menu Bar item titled Orders. Order Entry will be an item in the Orders drop-down menu.

On the Application Bar (see Figure 12-2.), the Order Entry button is located in the Orders pane.

If you are accessing Order Entry from the Patient Control Screen, it is also a choice on the Shortcut Menu.

Some Order Entry actions can be invoked directly from a flowsheet, such as placing a New Order and DCing an existing order (available flowsheet capabilities depend on flowsheet configuration).


Figure 12-2.
Application Bar

## Order Entry Concepts

Order Entry is a permissions-driven application for displaying, processing, communicating, and auditing orders. These concepts are described in the following paragraphs and sections.

### Permissions

Permissions are used to grant access to certain applications, and to perform various actions in Essentris. In Order Entry, permissions also determine how a given transaction, or group of transactions, is carried out and communicated to other users. For instance, entering a medication order is an action in Order Entry, but the order is transferred to the Meds flowsheet and to the Pharmacy system when the permissions of the user who acts on that order match predetermined criteria. The following permissions apply to Order Entry.

### Enter

The Enter permission is the most basic permission. It permits the user to enter, modify, and store the initial order. Once the order has advanced beyond the Enter state, a user with this permission alone can no longer affect the order.

### Acknowledge

Typically associated with an RN, the Acknowledge permission triggers the order to appear on flowsheets. Additional activities may also be triggered with the Acknowledge permission based on configuration, such as the printing of medication orders in Pharmacy.

### Sign

The Sign permission is typically assigned to an MD. Triggers, such as printing, can be associated with the Sign permission.

### Cosign (CS)

Similar to the Sign permission, Cosign is also typically assigned to an MD. Many facilities require a staff physician to Cosign orders that were Signed by students or residents.

### Verify

The Verify permission is generally assigned to a member of an ancillary department, such as a pharmacist, who uses that permission to communicate that the order has been reviewed and verified prior to further action within that department.

### DC

To process an Order to DC, users must be granted the DC permission.

## Typical User Permissions

An individual user can be assigned one or a combination of permissions depending on the range of activities that user is expected to perform. Such assignments are the responsibility of the System Administrator at a site. The following summarizes a typical set of Order Entry user types, and the permissions associated with those types.

### Ward Clerk

Permissions: Enter.

A ward clerk’s duties typically include: entering and copying orders; editing and removing orders before they are acknowledged or signed; annotating orders; renewing orders that expire; and, entering orders to DC. These duties are enabled by granting the Enter permission.

### RN

Permissions: Enter, Acknowledge, DC.

An RN’s duties typically include all of the duties of a Ward Clerk, plus the responsibility to acknowledge orders and DC’s. The Acknowledge and DC permissions allow the user to carry out these additional responsibilities.

### MD

Permissions: Enter, Sign, Cosign, DC.

An MD’s duties typically include all of the duties of a Ward Clerk, plus the responsibility to sign and cosign orders and DC’s. The Sign, Cosign, and DC permissions allow the user to carry out these additonal responsibilities.

### Pharmacist

Permissions: Verify, Enter

Pharmacists’ duties typically include all of the duties of a Ward Clerk, plus the responsibility for verifying pharmaceutical orders. The Verify permission allows the user to carry out this additional responsibility.

## Order States

Several users will act on an order throughout the lifetime of that order. To communicate and track the progress of an order, from the time it is first Entered until it is Discontinued and archived, the order will pass through many order states.

The state of an order can be described according to the signatures that have been entered into the audit trail of the order (such as Acknowledged). In addition, the order state can be described by available actions (Locked is an example), the nature of the order (such as Verbal), and so forth. Order state is thus a broadly defined term.

The following paragraphs describe the common states of an order. Note that some states are mutually exclusive (an order cannot be both Active and Removed), while some combinations of states may apply to the same order (an order can be both Active and Verbal). The state descriptions are presented alphabetically.

Also, note that the columns that appear for a given category of order in the Order Entry Application Display are configurable. Information displayed in a given column as indicated below will only appear if that column is configured to appear. All information pertaining to a specific order is available using the Describe Order action, regardless of configuration.

### Acknowledged

The order has been processed by a user with Acknowledge permission. Acknowledged orders can be identified by the presence of user initials in the ACK column.

### Active

The order is Active unless one of the following conditions is true:

- The order is Removed.
- The order is Previous.
- The Acknowledged Stop Time has passed, plus any supplemental time (orders can be configured to remain active for a supplemental hour or day).

### Complete

Associated with each category is a set of signatures that are necessary for that order to be considered Complete. There are three definitions that apply to the completeness of an order:

- RN, or nursing orders, are considered complete when they are Acknowledged;
- MD, or physician orders, are considered complete when they are both Acknowledged and Signed;
- RX, or pharmacy orders, are not considered complete until they have been Acknowledged, Signed, and Verified.

When a view is defined by Orders Without, only orders that would be incomplete without that signature are included. For example, if an order is an RN, or nursing order, then it will not be displayed in the Orders Without SIGN and Orders Without VER views.

### Cosigned

The order has been processed by a user with Cosign permission. Cosigned orders can be identified by the presence of user initials in the CS column.

Cosign is meant to apply to Signed orders. Thus, when exiting the Order Entry Application Display, any orders that are Cosigned but not Signed will be Signed automatically when exiting Order Entry, as if the user who Cosigned the order had also Signed the order.

### DCed

In its most generic context, an order is DCed if a Stop Time has been manually associated with it. However, the state of the order at the time of the DC determines how the Stop Time comes to be associated with the order.

If the order is not Locked, then the Stop Time can be modified directly. The DC will be recorded for audit purposes simply as an entered or modified Stop Time.

Once the order is Locked, then the Stop Time can no longer be modified. To DC a Locked order that does not contain a Stop Time, or to modify the Stop Time of a Locked order, an Order to DC (a new order) must be spawned for audit purposes. To create an Order to DC, the user must have the DC permission.

Orders to DC, like any order, may pass through many states during processing. Until the Order to DC is Acknowledged, it will be in the Pending DC state, and it will share the row with the order from which it was spawned in the OE Application Display.

Once Entered into the Pending DC state, the Order to DC can be Signed, Cosigned, and Verified using actions devoted to the purpose: DC SIGN, DC CS, and DC VERIFY.

Once the Order to DC is Acknowledged, then the Order to DC becomes the Active order, and the original order becomes a Previous order. Any signatures stored as DC ENT, DC SIGN, DC CS, and DC VERIFY become the ENT, SIGN, CS, and VER signatures of the active Order to DC. Signatures associated with the original order remain attached to the Previous order.

### Edited

If an order has been Entered, but is not Locked, then it can be Edited. Edited orders, containing information that might be different than the originally entered information, can be identified by the presence of user initials in the EDIT column.

Orders that have yet to be Entered can also be edited. However, such edits do not cause initials to be placed in the EDIT column.

### Entered

The order has been processed by a user with Enter permission. Entered orders can be identified by the presence of user initials in the ENT column.

### Expired

Some pharmacy orders have an imposed expiration which is part of the Order Entry formulary. A medication that expires displays an expiration time on the Order Form, and the Stop Time is set initially to the expiration time. Unlike orders where the Stop Time has been entered manually, an order that expires can be Renewed, even after the Stop Time has passed.

Also, an expire marker ([EXP]) is displayed as a prefix to the medication name when the expiration time is less than 12 hours (default) from the current system time. To change the number of hours before the expire marker is displayed, contact CliniComp Client Services.

### Locked

If the order has been either Acknowledged or Signed, then that order is Locked and cannot be edited or removed. Once an order is Locked, only the annotation to that order can be modified. If a Locked order requires modification to any field other than the annotation, that order must be DC'ed, and a new order initiated. To delete a Locked order, it must be DC'ed.

### New

A New order is any order that is assigned during the current Order Entry session but has not yet been entered. New orders can be identified by the presence of the triple asterisk in the ENT column.

New orders also display the triple asterisk in the ACK column. If the user who stores a New order has Acknowledge permission in addition to Enter permission, then that order becomes both Entered and Acknowledged. Similarly, if the user has Enter and Sign permission, then that order becomes Entered and Signed. In fact, storing a New order processes that order to every permission state assigned to that user.

### Pending, Pending DC

A Pending Order is any Active order that has not been Acknowledged.

Unacknowledged Orders to DC are in the Pending DC state, even if the Order to DC was Signed by a user with DC permission (refer to the DC’ed state for more information on the Pending DC state).

For optional View tabs for Pending Orders, see "Views" on page 178.

For sites with a pharmacy interface, Pending Order counts can be configured to display either the number of internal pending orders, or the number of internal pending orders and external pending orders. This option is configured by CliniComp Client Services.

### Previous

When an Order to DC or an Order to Renew are spawned from a Locked order, the original order becomes a Previous order.

### Removed

After it is Entered, but prior to becoming Locked, an order can be Removed from the Active state. Once Removed, the order is not available for further processing.

### Renewed

An order that is Expired or will expire can be Renewed.

Renewing an order that is not Locked pushes the Stop Time of that order into the future.

Renewing an order that is Locked spawns a New order in a fashion similar to a DC, with the original order becoming Previous. The New order is a copy of the original order with the new Stop Time pushed into the future.

### Signed

The order has been stored by a user with Sign permission. Signed orders can be identified by the presence of user initials in the SIGN column.

### Verbal

When the Order Form is filled out, a checkbox can be used to indicate that the order was placed verbally, and entered into Order Entry at a later time or by another user. In the Application Display, the Verbal Order (V/O) column will contain the letter O if the V/O box on the Order Editor form was checked. The V/O column will contain the letter D if the V/O box was checked on the DC Time form.

### Verified

The order has been processed by a user with Verify permission. Verified orders can be identified by the presence of user initials in the VER column.

## Order Processing

Order processing comprises all of the actions taken by various users to place, communicate, and discontinue orders. Basically, processing an order in some fashion changes the state and/or content of that order.

### Content Changes

Actions that create or alter the contents of an order are form-driven. The fields that comprise the relevant contents of an order appear on a pop-up window which is specific to the type of order being processed, and the action being requested. Once the form has been edited, the new or revised order contents are communicated to the Order Entry Application Display as a pending change.

Content changes are initiated by the following actions:

- New Order
- Edit Order
- Copy Order
- Annotate Order
- DC Time
- Auto DC

Once an order is Locked, only the annotation can be changed. Changes to the delivery schedule on a flowsheet are not considered changes to order content.

### State Changes

A user causes the state of an order to change by inputting an action in the Order Entry Application Display. How the state of the order changes depends both on the input action and the permissions of the user.

For example, an RN who wishes to acknowledge a Pending order would select that order and choose Acknowledge. Once the change was successfully stored, the order would no longer be in the Pending state. Furthermore, it would enter the Locked state if that order was not already Signed.

### Triple Asterisk (***)

A key concept related to order processing is that modifications to the order do not become part of the patient record until they are stored. The visual cue that alerts users to the presence of unstored modifications is the triple asterisk (***).

### Store

Whenever an order is modified, which includes its initial creation, the changes are temporary until they are Stored. All Active orders with changes pending are processed simultaneously when Store is invoked. How a given order is processed depends on the nature of that order and the configuration settings for the unit.

When the Store action is invoked by a user, Order Entry performs as much processing as allowed depending on the permissions that have been granted to that user. For example, when a user with Enter, Sign, and Cosign permissions edits an order, that order is automatically Entered, Signed, and Cosigned when that user Stores the order.

If Medication Decision Support is installed, the Store action initiates the screening process prior to further processing. If system interfacing is installed, the Store action queues the transfer of information between systems.

### Cancelling Changes

Once content changes have been Assigned, they are queued for processing with the next Store action. Each form includes a Cancel option which, when chosen, discards any changes made since the form was opened.

State changes are queued for processing as soon as they are input.

An order with changes in the queue is readily identified by the presence of the triple asterisk in the appropriate field(s).

Once queued, the only way to cancel processing changes to an exisitng order is to exit Order Entry, and decline to Save the changes when that option is presented. Note that all changes since the last Store are discarded by this process. CliniComp, Intl. recommends making and storing changes incrementally, rather than making a large number of changes before attempting to store.

### Annotations

Orders may include annotations. An annotation is treated differently than most order contents, but is rather like an attachment to the order. Annotations can be added, viewed, modified, and deleted at any point during the lifetime of the order.

### Communicating Orders

Order Entry places order information into the patient record from which it is retrieved by Essentris for display on flowsheets and summary screens. As part of the patient record, orders are available for analysis using, for example, CliniComp Intl’s Global Data Repository.

Order Entry can be configured so that orders may be placed and DC’ed directly from a flowsheet. This is limited functionality compared to the Order Entry Application Display, but eliminates the need to exit the current flowsheet.

Order Entry also presumes that order information is to be communicated to ancillary departments, such as Pharmacy and Lab. The manner in which order information is transmitted, and the trigger which causes the information to be sent, are determined by many factors depending on the needs and configuration of your facility.

The most basic method used to communicate order information to ancillary departments is with a configured hard-copy printout. For example, Medication orders may be configured to print on a laser printer in Pharmacy whenever that order becomes Locked, while certain Treatment orders may be configured to print on a laser printer in the ward whenever they are Acknowledged.

Order Entry can also be implemented with HL-7 interfacing, so that the orders may be transmitted electronically to dedicated systems in the ancillary departments.

## The Order Entry Display

The Order Entry Application Display is designed to facilitate order processing. The following paragraphs introduce the display features that are common in the Order Entry application.

### Views

A key concept that allows specialized processing by specific users is the concept of order Views. Orders are displayed according to one or a combination of criteria for ease of processing. These criteria define an order View. A given view is selected by clicking the associated View Tab at the bottom of the Order Entry Application Display. The following views can be configured for the Order Entry screen:

- **Active Orders** - the default view which is displayed when Order Entry is first invoked.
- **Orders Without ACK** - displays orders that have *not* been acknowledged.
- **Orders Without SIGN** - displays all orders that do *not* have SIGN.
- **Orders Without VER** - displays all orders that require verification.
- **Verbal Orders** - displays active verbal orders.
- **Verbal All Orders** - displays all verbal orders regardless of state. That is, any verbal order charted on a patient.
- **Pending SIGN Verbal Orders** - displays active verbal orders that do *not* have SIGN.
- **DC** - displays active DC orders initiated by someone other than the RN. These orders have *not* been acknowledged.
- **Pending SIGN DC Orders** - displays active DC orders that do *not* have SIGN.
- **Pending VER All Orders** - displays all orders that do *not* have VER.
- **Pending COSIGN Orders** - displays active orders that do *not* have COSIGN.
- **Pending COSIGN All Orders** - displays all orders that do *not* have COSIGN.

For sites with a pharmacy interface, the Pending Orders screen can be configured with the following View tabs: All Orders, Pending Orders, Acknowledged Orders, and External Orders. This option is configured by CliniComp Client Services.

### Allergy Warnings

Allergy warnings, as charted in an Allergy Note, are displayed in the Allergies textbox. The textbox contains information which may be selected and copied onto the Windows clipboard. Selecting text within the textbox is accomplished using Windows-standard mouse operations (including click-and-drag and double-click). To copy the selected text onto the Windows clipboard, right-click inside the textbox and select Copy.

## Category Sections

Orders are grouped and displayed on the Order Entry Screen by their category (selected when the orders are placed). A separate section is devoted to each category.

### Header

The name of the category is displayed in the Section Header. The number of pending orders in a given section, if any, is also displayed in the header.

### Columns

The sections are divided into columns. Columns can contain order contents (for example, Name, Dose, and Route), order signatures (such as ENT for Entered by and ACK for Acknowledged by), or order alerts (to indicate, for example, that a DC has been entered, or that this is Verbal Order). The specific columns that appear, and the sequence of columns within each section and within each unit, can be configured.

### Resizing Columns

The width of a column can be adjusted by dragging the column separator located to the right of the column title. Position the mouse over the column separator so that the Column Resizing Pointer appears (◂|▸), then click and drag the separator. The column can be auto-sized by double-clicking the separator.

### Hiding Columns

To hide a column, simply resize that column to be zero width. The mouse pointer indicates the presence of a hidden column by becoming a Split Arrow Pointer (◂||▸). To reveal the hidden column, click and drag the separator to the right.

### Rows

Each order is displayed as a row in the section associated with the that order’s category.

### Sorting Rows

When Order Entry is first accessed, the rows will be sorted according to rules determined by the configuration for each unit. For instance, the rows can be sorted chronologically by Order Time, or alphabetically by Name.

At any time, the rows within a section may be resorted by clicking the title of a column. If the column contains numerical data, the rows in that section will be sorted numerically. Similarly, if the column contains text, the section will be sorted alphabetically. And if the column is a date/time field, the orders will be sorted chronologically.

Each time the column title is clicked, the sorting order will be reversed. Thus, the first time the Order Time column is clicked, the orders will be sorted from earliest to latest. The second time will cause the orders to be sorted into reverse chronological order, with the most recent order appearing at the top of the section.

### Minimize Section

To minimize a category section, click the Minimize button in the upper right corner of that section ( ). In Figure 12-1."Order Entry Application Display" on page 169, the Diet Orders section is shown minimized.

### Maximize Section

To maximize a category section, click the Maximize button in the upper right corner of that section ( ). All sections are maximized by default when Order Entry is first invoked.

## Order Selection

To perform some action on an order (or on multiple orders), the row containing the order(s) must first be selected. The cursor is a blue horizontal bar which indicates the selected row(s). To select an order on which some action is to be taken, click anywhere in that row.

### Selecting Multiple Orders

After one order has been selected, additional orders may be selected for simultaneous actions by holding the Ctrl key while clicking the mouse. While the Ctrl key is depressed, clicking the mouse will alternately select or deselect the row under the pointer.

A block of conitiguous rows may be selected by selecting the first row in the block, and holding the Shift key while clicking the last row in the block.

# Order Entry Actions

Three types of actions are available in Order Entry:

- Actions that affect how orders are displayed.
- Actions that create or modify the content of orders and annotations.
- Actions that are used to process orders.

Generally, an action can be invoked in one of two ways:

- By selecting it from a Menu Bar drop-down.

  Most actions are located under the Order Entry item on the Menu Bar. Some display actions are located under the OE Options item.

- By selecting it from a Shortcut Menu.

  The Shortcut Menu is limited to those actions contained in the Order Entry drop-down menu. To display the Shortcut Menu, place the mouse pointer over an order section and right-click.

Some actions may also be available using “hot keys” on the keyboard, or by special mouse operations (such as double-clicking). In the descriptions that follow, the access methods are listed on the line below the paragraph header.

## Display Actions


### Create View
Order Entry Menu, Shortcut Menu

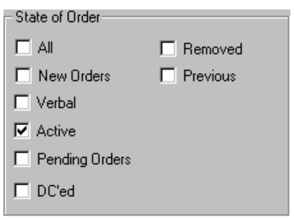

### Edit View
Order Entry Menu, Shortcut Menu

Views can be created and edited to supplement the default views present when Order Entry is launched. When Create View or Edit View is invoked, the Create View Dialogue box pops up. The details of the View are specified by the choices made in the sections of the pop-up.

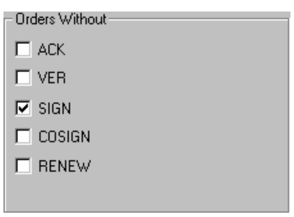

There are three buttons at the bottom of the pop-up:

- **Reset**
  Click Reset to return all of the choices in the pop-up to their initial settings;
- **OK**
  Click OK (or press Enter on the keyboard) to create a view with the specified settings and close the pop-up;
- **Cancel**
  Click Cancel to close the pop-up without creating a the custom view.

The following two Create View criteria contain check boxes. With the exception of All in State of Order selections, multiple checkboxes may be selected simultaneously.




The State of Order selections are used to indicate which order states should be included in the custom view.

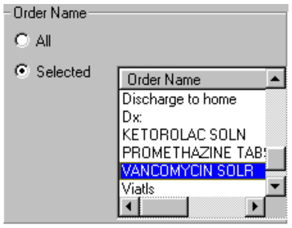



The Orders Without selections are used to narrow the view for specific users.

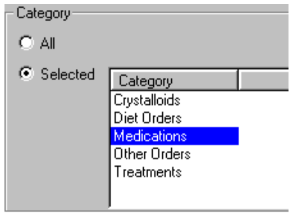
Five Create View criteria contain two buttons: All and Selected. When the Selected button is pushed, a scroll box appears containing the available choices associated with the given criterion.

The choices that appear in the scroll box are limited by what has already been selected as criteria. For example, if Pending Orders without Sign are specified, the Order Name scroll box will only contain orders that are unsigned and pending. Similarly, if Treatments are first specified in the Category criterion, then only doctors who have ordered treatments will be displayed in the Physician criterion. To reset a criterion, click the All button.

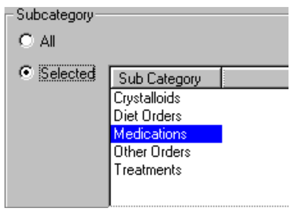
For all scroll boxes, hold the Ctrl key while clicking to make multiple selections, or the Shift key to select a contiguous block.



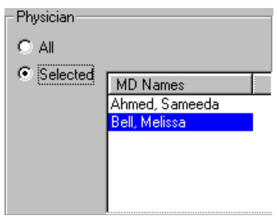

To select orders by order name, click the Selected button in the Orders Name section of the Create View pop-up.



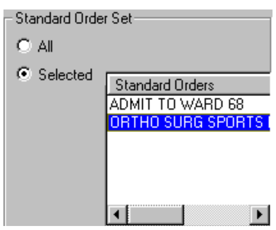

Selected orders may be included by category.




Selected orders may be included by subcategory.




Selected orders may be included by Physician.




Selected orders may be included based on the Standard Order Set from which they were assigned. Standard Order Sets are described in "Standard Order Sets" on page 200 and "Standard Order" on page 183.


The last Create View criterion is titled Chart Review. It is used to narrow the displayed orders to specific time/date intervals. To activate the time/date filter, click the Chart Check check box.

A date may be specified using the drop-down calendar. To open the calendar, click the large down arrow at the right of the time/date field.

The mouse can be used to position a selection cursor in the Start Time or End Time field. For example, click on the month to select the month field for editing. Once the cursor is within the time/date field, the right and left arrows on the keyboard can be used to reposition the cursor.

There are several ways to modify the selected portion of the date and time:

- Clicking the small up and down arrows at the right of the time/date field
- Pressing the up and down arrows on the keyboard
- Typing on the keyboard (for the month, press the first letter of the desired month to cycle through the months that begin with that letter)

### Standard Order

Order Entry Menu, Shortcut Menu, Ctrl-T

The Standard Order action creates a view of a selected Standard Order Set. However, Standard Order Sets straddle the Display Action and Content Action concepts, and are described in "Standard Order Sets" on page 200.

### Remove View

OE Options Menu

Deletes the current View from the Order Entry Application Display.

### Describe Order

Order Entry Menu, Shortcut Menu

Opens a pop-up text scroll box containing the complete audit trail information for the selected order. Audit trail information includes the contents of the order, the edit history of the order, and any annotations associated with the order.

As with other text scroll boxes in Order Entry, the contents of the Order Descripton pop-up may be selected and copied onto the Windows clipboard. Selecting text within the scrollbox is accomplished using Windows-standard mouse operations (including click-and-drag and double-click). To copy the selected text onto the Windows clipboard, right-click inside the scroll box and select Copy.

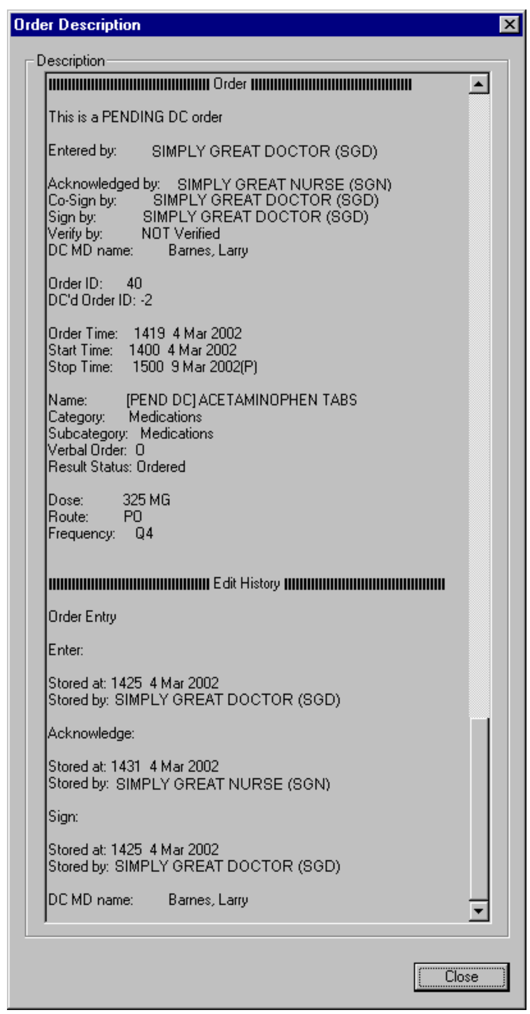



Figure 12-3. Order Description popup

### Section Layout

OE Options Menu

Opens a pop-up dialogue box for changing the order in which category sections are displayed.

### Zoom In

OE Options Menu

Increases the size of the display font.

### Zoom Out
OE Options Menu

Decreases the size of the display font.

## Content Actions

Content actions are used to create and modify orders. There are seven content actions that fall into three types:

1. Those that make use of the Order Editor form.
   - New Order
   - Copy Order
   - Edit Order
2. Those that modify only the Stop Time, or that spawn a new order to affect the Stop Time of a Locked order.
   - DC Time
   - Auto DC
   - Renew Order
3. Those used to create and modify annotations.
   - Annotate Order

### New Order
Order Entry Menu, Shortcut Menu, Ctrl-N

**New Order** is used for the initial creation of an order. If Order Entry is configured for flowsheet access, **New Order** can also be invoked from the Flowsheet Actions menu. Refer to "Order Editor from a Flowsheet" on page 198.

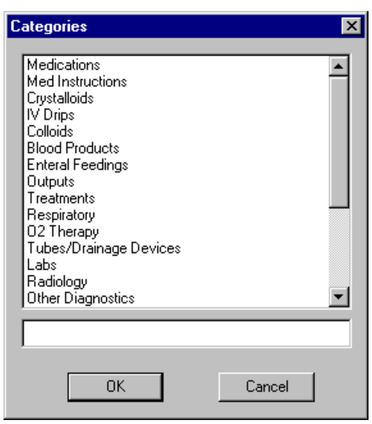



Figure 12-4. Categories popup

The Category pop-up appears when **New Order** is selected. Select a category from the list that appears by clicking on it and then clicking **OK**, by double-clicking the selection, or by typing the first letter of the category name and pressing **Enter** (each time you type a letter, the next category beginning with that letter is highlighted). The type ahead feature can be used after clicking in the text box to pare the category list. A category can be selected from the available list at any time. Choose a subcategory from the Subcategory pop-up in the same way. The Subcategory pop-up appears only when it is applicable.

To abort the **New Order** action while the Category or Subcategory pop-up is open, click **Cancel** or press **Esc**.

Once the Category and Subcategory are chosen, the **Order Editor** form appears preloaded with the Order and Start Times preset to the current time. The Stop Time and all other fields are blank. See the description of "The Order Editor" on page 190 for further information.

### Copy Order
Order Entry Menu, Shortcut Menu

To base a new order on an existing order, Copy Order can be used. An order can be copied from any view other than a Standard Order view. The order to be copied must first be selected in the OE Application Display. When Copy Order is invoked, the Order Editor form pops up preloaded with the information contained in the selected order. Multiple orders must be copied individually. See the description of "The Order Editor" on page 190 for further information.

### Edit Order
Order Entry Menu, Shortcut Menu, Ctrl-E

Orders which are not Locked may be modified using Edit Order. The order to be edited must first be selected in the OE Application Display. When Edit Order is invoked, the Order Editor form will pop up preloaded with the information contained in the selected order. See the description of "The Order Editor" on page 190 for further information.

### DC Time
Order Entry Menu, Shortcut Menu

The DC Time action is used to add or modify a Stop Time to an order which is Pending, or to spawn an Order to DC for an order that is Acknowledged. DC Time can be invoked while multiple orders are selected, and the action applies to each selected order as appropriate.

Figure 12-5. DC Time form.

To complete an Order to DC, you must have DC permission.

The DC Time form (see Figure 12-5.) contains three fields:

1. **DC Time**
   When the form is first opened, the DC Time field will be pre-loaded with the current time. To modify the date and/or time, position the mouse pointer over a sub-field and click to select. For example, click on the month to select the month field for editing. Once the cursor is within the time/date field, the right and left arrows on the keyboard can be used to select neighboring sub-fields. There are several ways to modify the selected sub-field of the date and time:
   - Clicking the small up and down arrows at the right of the time/date field
   - Pressing the up and down arrows on the keyboard
   - Typing on the keyboard (for the month, press the first letter of the desired month to cycle through the months that begin with that letter)

   A date can also be specified using the drop-down calendar. To open the calendar, click the large down arrow at the right of the time/date field.

2. **MD Name**
   Click the arrow at the right of the MD Name choicelist field (or simply click once in the field) to display the choices. Use the scroll bar until the desired choice is visible, then click that choice to select it.

   Items on the choicelist may also be selected using the type-ahead feature. To use the type-ahead feature, double-click inside the field and begin typing the name of the desired selection. As each letter is added, the first item from the choicelist which matches what has been typed so far is presented in the field. When the desired item is displayed, press Tab or click into another field.

3. **V/O**
   To indicate a verbal order, check the V/O checkbox.

There are two buttons at the bottom of the DC Time form:

1. **OK**
   When OK is chosen, the information on the DC Time form is transferred to the OE Application Display in a temporary state yet to be Stored. When the DC Time field is transferred, it is rounded up to the following whole hour. A triple asterisk is placed into one or more columns on the Application Display to indicate the not-yet-Stored status of the order.

   Clicking OK initiates one of two scenarios, depending upon whether the order is Pending or Acknowledged:

   - **Pending**
     The new DC Time is treated as an edit to the order. A triple asterisk appears in the ACK and EDIT columns.
   - **Acknowledged**
     Once an order is Acknowledged, the Stop Time can not be modified. Thus, to DC an Acknowledged order, an Order to DC is spawned. Between the time that the Order to DC is created and the time that it is Acknowledged, both the original order and the Order to DC are in the Pending DC state. Once Acknowledged, the original order is relegated to the Previous state, while the Order to DC becomes the Active order.

2. **Cancel**
   Click Cancel to discard the DC Time form and return to the OE Application Display.

An Order to DC is subject to the same processing rules as all orders. While the Order to DC is Pending, the Stop Time may be modified directly using the DC Time action. However, once the Order to DC is Acknowledged, then a new Order to DC will be spawned (and the obsolete Order to DC will be made Previous) in order to modify the Stop Time.

## Auto DC

Order Entry Menu, Shortcut Menu

Auto DC applies the DC Time action to a preconfigured set of orders. When invoked, a pop-up dialogue box will appear from which the preconfigured set of orders is chosen (see Figure 12-6.). Click on the desired Auto DC choice, then click OK to proceed or Cancel to abort.

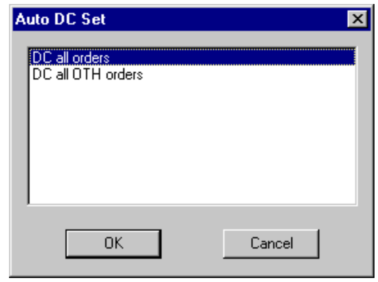



Figure 12-6. Auto DC form.

After the preconfigured set of orders is chosen, the DC Time form will appear. The DC Time action will be applied to each of the preconfigured orders.

## Renew Order

Order Entry Menu, Shortcut Menu

The Renew Order action applies to Medication orders that have an associated expiration time in the OE formulary. When invoked, a pop-up dialogue box will appear in which the MD Name can be selected for the Renew (see Figure 12-7.). Once the MD Name is chosen, click OK to proceed. Click Cancel to abort the Renew.

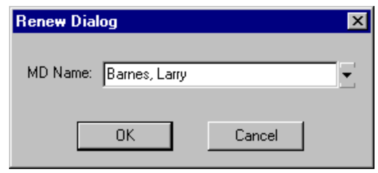



Figure 12-7. Renew form.

When a Medication that expires is ordered, the Stop Time will be preloaded with the initial expiration time, which is one expiration interval after the Start Time. The expiration interval can be deduced by subtracting the Start Time from the Expires time on the Order Editor form for the new order. Each time the Renew Order action is invoked, one expiration interval will be added to the Stop Time.

The Renew Order action mimics the DC Time action in many respects. In particular, if the order being renewed is Pending, then the renewal is treated as a simple edit to the Stop Time. However, if the order is Acknowledged, then an Order to Renew will be spawned, and the original order will become Previous.

The DC marker on the flowsheet will agree with the Acknowledged Stop Time of the Active order, regardless whether that Stop Time is associated with an expiration or a manual DC.

## Annotate Order

Order Entry Menu, Shortcut Menu

Annotate Order is used to attach additional information and communications to an order. An annotation is distinct from the body of the order because it can be modified after the order is Locked. Previous and Removed orders can not be annotated.

When Annotate Order is invoked, a pop-up textbox will appear. Any existing annotations to the order will be displayed in the textbox. The text can be changed or appended, or copied to the Windows clipboard.

## Processing Actions


### Acknowledge Order

Order Entry Menu, Shortcut Menu, Ctrl-A

The selected order(s) and/or Order(s) to DC are readied for Acknowledgement by executing the Acknowledge action. The next Store action will place the name of the user into the audit trail for the order(s), assuming that the user has Acknowledge permission. To acknowledge an Order to DC, the user must also have DC permission. Orders which have been readied for Acknowledgement are easily identified by the triple asterisk in the ACK column. The Acknowledgement permission is generally associated with an RN.


### Sign Order

Order Entry Menu, Shortcut Menu, Ctrl-S

The selected order(s) are Signed (pending Store) by executing the Sign action. The next Store action will place the name of the user into the audit trail for the order(s), assuming that the user has Sign permission. Orders which have been readied for Signing are easily identified by the triple asterisk in the SIGN column The Sign permission is generally associated with an MD.


### Cosign Order

Order Entry Menu, Shortcut Menu

The selected order(s) are Cosigned (pending Store) by executing the Cosign action. The next Store action will place the name of the user into the audit trail for the order(s), assuming that the user has Cosign permission. Orders which have been readied for Cosigning are easily identified by the triple asterisk in the CS column. The Cosign permission is generally associated with an MD who oversees orders placed by interns, medical students, and so forth.


### Verify Order

Order Entry Menu, Shortcut Menu

The selected order(s) are Verified (pending Store) by executing the Verify action. The next Store action will place the name of the user into the audit trail for the order(s), assuming that the user has Verify permission. Orders which have been readied for Verification are easily identified by the triple asterisk in the VER column. The Verify permission is generally associated with Pharmacy.


### DC Sign

Order Entry Menu, Shortcut Menu

The selected Order(s) to DC are Signed (pending Store) by executing the DC Sign action. The next Store action will place the name of the user into the audit trail for the order, assuming that the user has Sign and DC permissions. Orders which have been readied for DC Signing are easily identified by the triple asterisk in the DC SIGN column.


## DC Cosign

Order Entry Menu, Shortcut Menu

The selected Order(s) to DC are Cosigned (pending Store) by executing the DC Cosign action. The next Store action will place the name of the user into the audit trail for the order, assuming that the user has Cosign and DC permissions. Orders which have been readied for DC Cosigning are easily identified by the triple asterisk in the DC CS column.


## DC Verify

Order Entry Menu, Shortcut Menu

The selected Order(s) to DC are Verified (pending Store) by executing the DC Verify action. The next Store action will place the name of the user into the audit trail for the order, assuming that the user has Verify and DC permissions. Orders which have been readied for DC Verification are easily identified by the triple asterisk in the DC VERIFY column.

## Store

Order Entry Menu, Shortcut Menu

Whenever an order is created or modified, which includes the processing actions described above, those changes are temporary until they are Stored. All Active orders with changes pending are processed simultaneously when Store is next invoked. Orders with changes pending are identified by the presence of a triple asterisk in one or more columns of the OE Application Display.

Whenever a Content Action results in a new or modified order, that order is “preloaded” with all Processing Actions. The permissions granted to the user who signs for the Store action determine how each content change is processed. Order Entry performs the processes designated by the permissions granted to that user. For example, when a user with Enter, Sign, and Cosign permissions creates a New Order, that order is automatically Entered, Signed, and Cosigned when that user Stores the order.

If the user who attempts to store content changes does not have the necessary permission for the pending change, Order Entry does not make the change, but the content change remains pending. On the other hand, if the user who attempts to store audit trail signature information does not have the necessary permission for the pending change, Order Entry discards the pending change.

## The Order Editor

The Order Editor form that is opened from the Order Entry window is described below. An Order Editor form can also be opened from a flowsheet. To use this Order Editor form, refer to "Order Editor from a Flowsheet" on page 198.

The New, Copy, and Edit Order content actions each make use of the pop-up Order Editor form, which contains its own icons and actions. Customized templates can be added for categories and subcategories. For example, under Input Orders type, Fluids can use a different Order Editor screen than Blood Products. Contact CliniComp Client Services to configure the Order Editor fields.

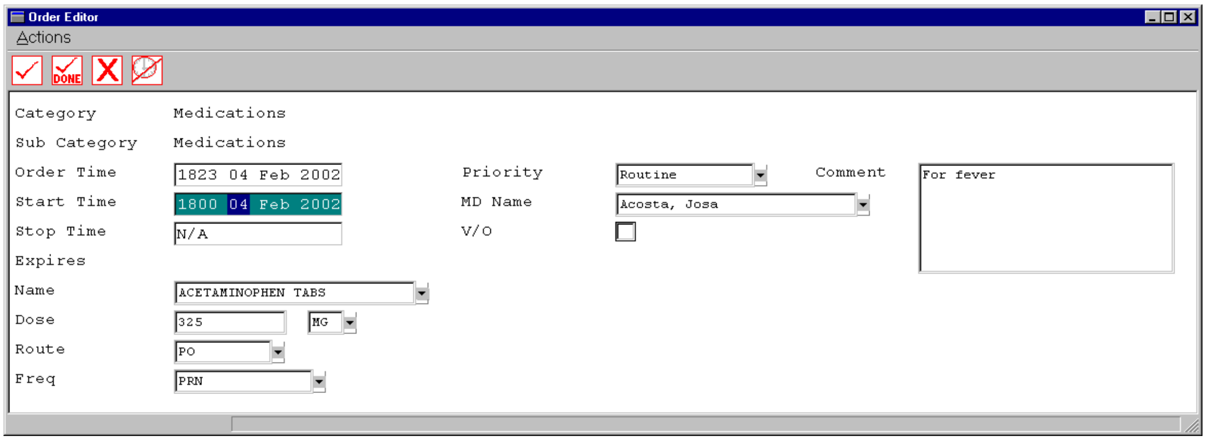



Figure 12-8. Example of an Order Editor form using a Medications Category. Forms in other categories, in different environments, and at your site might be configured with a different appearance.

**Note:** For Medications and IV Drugs, a 0 (zero) is inserted before the decimal point when a dose is less than 1. For example, if the dose entered in a dose field is .4, it is displayed as 0.4.

### Actions

The following actions are available in the **Order Editor** form. They are available on the **Actions** menu, the icon bar, and the shortcut menu.

#### Assign

When Assign is chosen, the information on the Order Editor form is transferred to the OE Application Display. The triple asterisk will be placed into one or more columns on the Application Display to indicate the not-yet-Stored status of the order. An empty Order Editor form associated with the same Category replaces the completed form. Choose Assign when additional orders are to be placed from within the same Category.


#### Done

Same as Assign, except that the user is returned to the OE Application Display. Choose Done to choose a new Category, or when finished creating or editing orders.

### Cancel Edit

Use Cancel to discard any information entered into the Order Editor form and return to the OE Application Display. Orders previously Assigned are not affected by Cancel.

### Enter Time

When an empty Time/Date field is selected, use the Enter Time action to insert the current date and time.

### Clear Time

When a Time/Date field containing a value is selected, use the Clear Time action to remove the value.

While an Order Editor form is open, some OE Application Display actions remain available, including Zoom In, Zoom Out, and Describe Order. To work in the Application Display without closing the Order Editor form, minimize the form. Only one form can be open at a time.

## Field Types

Depending on the selected Category, one of up to six Order Editor forms is displayed. The forms behave similarly, differing only in the fields which comprise the content of an order belonging to that Category. For example, an order for an Input fluid or IV Drip contains a Rate field, whereas an order for a Medication contains a Frequency field.

To select a field for editing, position the mouse pointer in that field and click. Use the Tab key to select the next field, and use the Shift+Tab to select the previous field. The OE Application Display remains open behind the Order Editor pop-up. To view the Application Display window, minimize the form.

Each field on the form is one of the following types, depending on how Order Entry is configured.

### Informational

Informational fields can not be edited. In the example form displayed in Figure 12-8., Category, Subcategory, and Expires are informational fields.

### Time/Date

Time/Date fields are comprised of the following sub-fields: hour; minutes; day; month; year. To modify, click on the box to highlight one of the sub-fields. The right and left arrows on the keyboard can be used to choose a neighboring sub-field. The up and down arrows on the keyboard can be used to increase or decrease the value of the sub-field. Sub-field values also may be modified directly by typing on the keyboard (try selecting the month sub-field and pressing the J key several times).

When Assigned to the OE Application Display, Start Times are rounded back to the previous whole hour, and Stop Times are rounded forward to the next whole hour. Note that Start Time can be optionally configured to show minutes. Contact CliniComp Client Services.

In the example form displayed in Figure 12-8., Order Time, Start Time, and Stop Time are Time/Date fields.

### Using Choicelists

A choicelist field is identified by the arrow button at the right of the text box. In the example **Order Editor** screen displayed in Figure 12-8., Name, Dose Units, Route, Freq, Priority, and MD Name are choicelists.

There are two types of choicelist:

- **Enforced**
  When a choicelist is enforced, the text box must contain only items from the choicelist. Free text is not accepted by the text box.
- **Unenforced**
  When a choicelist is unenforced, the text box can contain items from the choicelist and/or text entered from the keyboard. Free text is accepted by the text box.

  For unenforced choicelists, be sure to select the item from the list with the cursor or the arrow key and press Enter. Otherwise, pressing Enter without selecting the item name causes the partially entered name in the text box to be accepted as a free-text name.

#### *Choicelist Modes*

There are two choicelist modes: **Append** and **Replace**. The Status Bar displays the mode. Use the **Insert** key to switch modes.

Use the **Append** mode to add choicelist items to existing choicelist items in a text box. Use the **Replace** mode to replace existing choicelist items in a text box with new choices.

**Entering Choicelist Items in an Empty Text Box.** The choicelist mode is automatically set to **Append**. The Status Bar message should be “Now in Choicelist APPEND Mode. Press [Insert] to switch to REPLACE mode.” If any other message is showing, press the **Insert** key to toggle to the **Append** mode. First, display the choicelist by clicking the mouse anywhere in the text box or by clicking the text-box arrow. If necessary, use the scroll bar to locate the choicelist item. Click the item to select it, or use the up- or down-arrow keys on the keyboard to select the item. Press the **Enter** key to enter the item in the choicelist text box.

To select multiple items from the choicelist, hold down the **CTRL** key while making the selections, and then press **Enter**. Use the **Shift** key to select consecutive items in the choicelist, and press **Enter**. Choices appear in the text box in the order selected.

#### *Additional Features*

- When the cursor is moved using keyboard navigation, such as the **Tab** key or **Enter** key, to a field that contains text, the cursor is placed at the end of the text. The mode is now **Replace** mode. Pressing the **+** key changes the mode to **Append**, adds a space, and opens the choicelist containing available choices.

- When the first field in the Order form is a choicelist field, the choicelist opens when the Order is opened.
- By using the mouse, the cursor can be placed anywhere in the text box field. This can be used to insert a new choicelist item between existing items in the text box.

**Searching a Choicelist with Auto-Match.** To search for specific choicelist items, use the Auto-Match feature. This feature is active only in the **Append** mode and can be activated by any of the following actions.

- Navigating from a field to a field that contains a choicelist.
- Clicking the choicelist arrow to open the choicelist.
- Pressing the + key to go into **Append** mode.

When typing in a choicelist field, the choicelist displays items at the top of the list that begin with the typed text. Choicelist items are placed at the end of the list that contain the typed text but not at the beginning of the item name. Text is matched from left to right and is *not* case sensitive.

When the text typed-in matches the beginning of a choicelist item, the item is highlighted. If the highlighted item is *not* the correct item, continue to enter additional characters to narrow the choices, or use the arrow keys to move to another item. Use the **Enter** key, **Tab** key, **Shift+Tab** keys, or click the mouse in a different field to put the highlighted item in the choicelist field. Use the **Esc** (escape) key to unhighlight an item.

> Note
>
> *When you are using the Auto-Match feature in an unenforced choicelist, be sure to select the item from the list with the mouse or the up- or down-arrow key on the keyboard and press* ***Enter****. Otherwise, pressing* ***Enter*** *without selecting the item name from the choicelist is interpreted by the system as a free-text entry.*

**Appending Choicelist Items to a Populated Text box.** To add choicelist items to a text box that contains existing items, first open the choicelist by pressing the + key on the numeric keypad. Select an item from the choicelist and press **Enter** to append it to the existing text-box items. Continue to press the + key and select additional items from the choicelist, one at a time, until all needed items are added to the text box.

**Replacing Choicelist Items in a Text box.** Open the choicelist by clicking the mouse in the text box or clicking the down arrow. To replace all existing items in the text box, click on the new item from the choicelist. To add more than one replacement item, use the + key after the first replacement item is entered. For medication choicelists, see the **Caution** message below under **Medications Name Choicelist**.

### Checkbox

A checkbox is provided to indicate a “Yes” (checked) or “No” (unchecked) response. To toggle from checked to unchecked and back again, either click in the checkbox, or press the spacebar when the checkbox is the selected field. In the example form displayed in Figure 12-8., V/O is a checkbox field.

### Text Box

A text-box field, typically used for comments, is used to enter free text. CCI recommends keeping free text entries as brief as possible. In the example form displayed in Figure 12-8., the Dose Value field and the Comment field are both text boxes.

## Medications Name Choicelist

The **Name** field choicelist in the **Medication Order Editor** form is specially constructed from the **Order Entry** formulary, which itself is constructed from the formulary at the site. Some customization can be included to accomodate Decision Support and Pharmacy System Interfaces.

**Caution:** *For medication and IV Drip name choicelists, do not select mulitple items. Unless instructed otherwise by the appropriate authority, only one medication or IV Drip name should be selected.*

Three types of choices appear on the choicelist:

### Drug Nomenclatures

Drug Nomenclatures uniquely identify each item in the Order Entry Medication formulary. Drug Nomenclatures are stored in the patient record.

The Drug Nomenclature for a Medication is made up of five fields. Some features of these fields depend on configuration, while other features are independent of configuration. In the example presented in Figure 12-9., the fields are defined as follows:

- Display Name (also referred to as Short Name) is described in detail below.
- Nominal Strength Value is usually the strength number associated with the drug. (Nominal implies that the value of this field will not appear in the dose value field on the Order Editor form regardless of configuration.)
- Default Dose Unit is the unit of measure associated with the dose value, such as MG for Acetaminophen. (Default implies that the value of this field will be transferred to the dose unit field on the Order Editor form regardless of configuration. The default value can be overridden by the user.)
- The fourth field is configured to meet the needs of each hospital. In this example, Pharmacy Identifier is a field used to link the item in the Order Entry Medication formulary to the formulary stored in the pharmacy system. The value of this field is not transferred to the Order Editor form.

- The fifth field is configured to meet the needs of each hospital. In this example, Nominal Route is the typical route of administration for this medication. The value of this field will not appear on the Order Editor form.

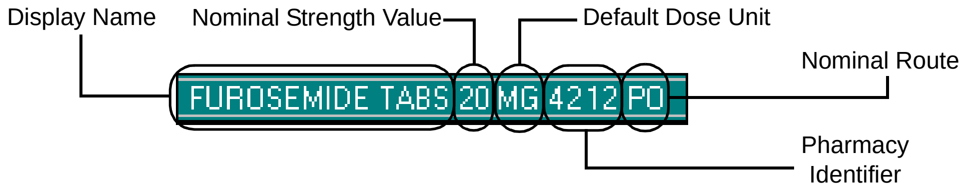



Figure 12-9. Medication Drug Nomenclature example.

## Display Names

Display Names become the Name on the Order Editor form and in the Order Entry Application Display. They also appear on flowsheets, printouts, and most other places that Medication orders are displayed by Essentris. Display Names are normally the name used by the pharmacy system in order to keep the systems synchronized.

From time to time, the Order Entry Medication formulary is updated. If a patient record contains a Drug Nomenclature which is no longer present in the Order Entry formulary, that entire Drug Nomenclature is used as the Name in the Order Entry Application Display and on printouts. Flowsheets will continue to display the original Display Name.

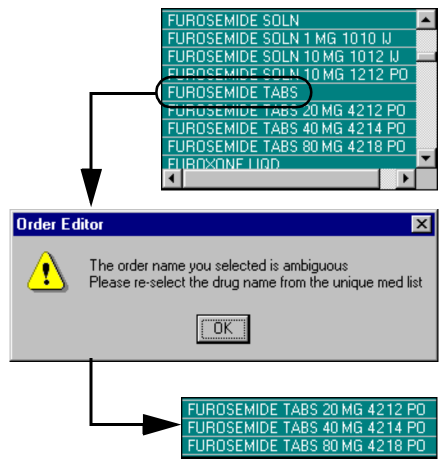



Figure 12-10. Resolving an ambiguous Display Name.

While each item in the formulary is assigned one Display Name, Display Names are not unique. The same name could refer to different strengths, forms, preparations, and so forth. If the chosen Display Name uniquely identifies a Drug Nomenclature, then there is no ambiguity and that Nomenclature will be stored in the patient record.

If, however, the chosen Display Name does not uniquely identify a Drug Nomenclature, then the ambiguity must be resolved. In the example displayed as Figure 12-10., “Furosemide Tabs” is a Display Name associated with three Drug Nomenclatures. Selecting “Furosemide Tabs” from the choicelist causes a pop up ambiguity warning that instructs the user to resolve the ambiguity. To resolve the ambiguity, click the **OK** button and a reduced choicelist will be available in the Name field that includes only those Drug Nomenclatures associated with the previously selected Display Name.

### Aliases

Aliases are names that can be selected from the Medication Name Choicelist, but which point to an item with a Display Name other than the Alias. Each item in the formulary can have up to eight aliases.

If an Alias chosen from the Medication Name Choicelist is associated with a single Drug Nomenclature, the Alias will be replaced automatically by the Display Name on the Order Editor form.

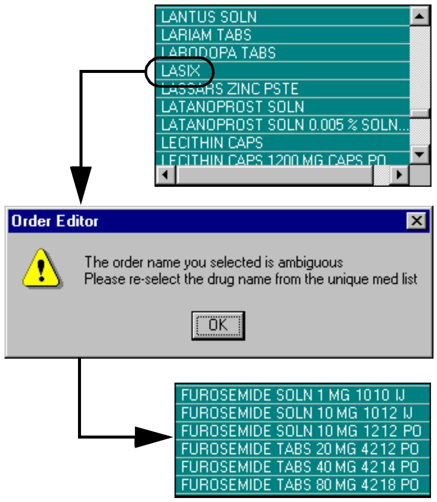



Figure 12-11. Resolving an ambiguous Alias.

If, however, the chosen Alias is associated with multiple Drug Nomenclatures, then the ambiguity must be resolved before the patient record can be updated. In Figure 12-11., “Lasix” is an Alias associated with six Drug Nomenclatures, three of which have Display Name “Furosemide Soln,” and three that have Display Name “Furosemide Tabs.” Selecting “Lasix” from the choicelist causes a pop up ambiguity warning that instructs the user to resolve the ambiguity. To resolve the ambiguity, click the OK button and a reduced choicelist will be available in the Name field that includes the six Drug Nomenclatures associated with the selected Alias.

## IV Drip Order Editor

Order Editor forms for the IV Drip category contain fields and features uniquely suited to the ordering of IV drugs.

### Name Choicelist

The Order Entry IV Drip Name choicelist is constructed in a fashion similar to the Medication Name choicelist. The same three types of choices appear on the choicelist, namely Drug Nomenclatures, Display Names, and Aliases. Display Names and Aliases behave the same on the IV Drip Order Editor as on the Medications Order Editor.

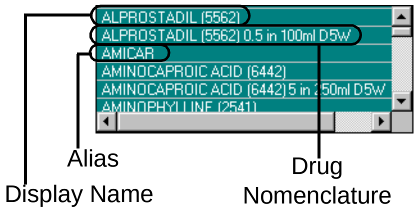



Figure 12-12. IV Drip Name Choicelist

The Drug Nomenclature for an IV Drip is made up of four fields:

- The Display Name. In the example in Figure 12-13., the Pharmacy Identifier is included parenthetically in the Display Name.
- The Default Amount Value of the drug (measured in the default units displayed on the IV Drip Order Editor). Default implies that this value will be entered onto the order form, but can be changed by the user.
- The Default Volume of the carrier fluid (measured in ml). Default implies that this value will be entered onto the order form, but can be changed by the user.

- The Default Carrier. Default implies that this value will be entered onto the order form, but can be changed by the user.

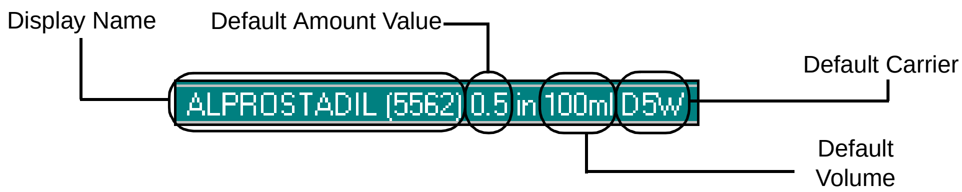



Figure 12-13. IV Drip Drug Nomenclature example.

### Multiple Drugs

Depending on the configuration at your site, the IV Drip Order Editor can accomodate up to four drugs. A second line will appear on the Order Editor once the first drug has been selected off the Name choicelist. A third line will appear after the second drug is chosen, and similarly for a fourth line if so configured.

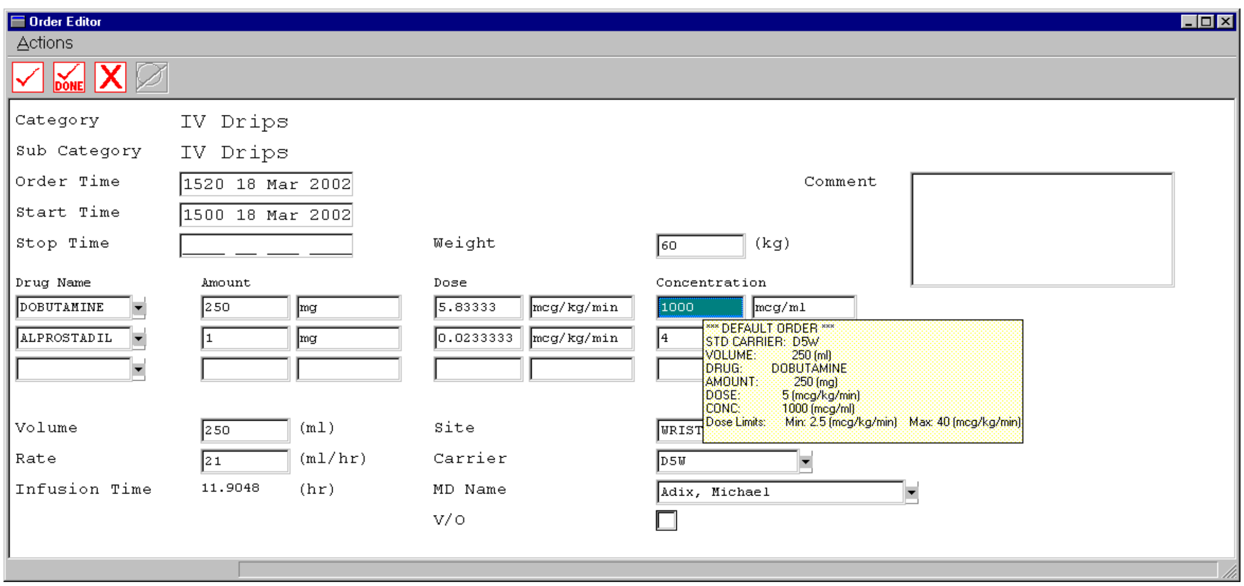



Figure 12-14. Example Order Editor for the IV Drips category

### Default Order Popup

Each IV Drip item in the Order Entry formulary has a Default Order associated with it. Once the Name is selected, the values from the Default Order are loaded into the corresponding fields in the Order Editor (for the first drug only, if configured for multiple constituents). To view the Default Order, click into the Name, Amount, Dose, or Concentration value fields, then move the mouse pointer away from, and back over that field. If the mouse pointer hovers over the selected field for a second or two, the Default Order will be displayed, similar to a Toggle Tooltip prompt.

The Default Order includes the following fields:

- Standard Carrier
- Volume (of carrier fluid)
- Display Name
- Amount (the amount of medication in the solution)
- Dose (Amount per time, and possibly per body weight)
- Concentration (Amount per Volume)
- Dose Limits (optional Minimum and Maximum Dose)

The units associated with the Default Order (such as mg for Amount, and mcg/ml for Concentration) become the units on the Order Editor. The units are Informational fields; they cannot be edited.

### Calculated Fields

The default values can be modified by double-clicking the field and typing a new value. When the value of a field is changed, associated field values are automatically recalculated. The following equations apply:

Dose = Amount / Infusion Time
OR
Dose = Amount / Weight / Infusion Time

Concentration = Amount / Volume

Infusion Time = Volume / Rate

### Weight

When a drug is chosen from the IV Drip choicelist with kg in the default Dose units, the following criteria applies:

- The Weight field appears on the Order Editor for use in the Dose calculation.
- Order Entry attempts to retrieve the patient's weight from the patient record for display in the Weight field.
- Weights manually entered onto the Order Editor form are stored as part of the audit trail of the order, but are not communicated beyond that order.

## Order Editor from a Flowsheet

When **New Order** is selected from the **Flowsheet Actions** menu, the display switches to the **Order Entry** screen and the **Category** list appears. Select a category and click **OK** to open the **Order Editor** form.

This **Order Editor** form differs from the **Order Editor** form opened from the **Order Entry** screen in that an order can be stored from this **Order Editor** form. The actions of the **Order Editor** form initiated from a flowsheet are described in the following paragraphs.

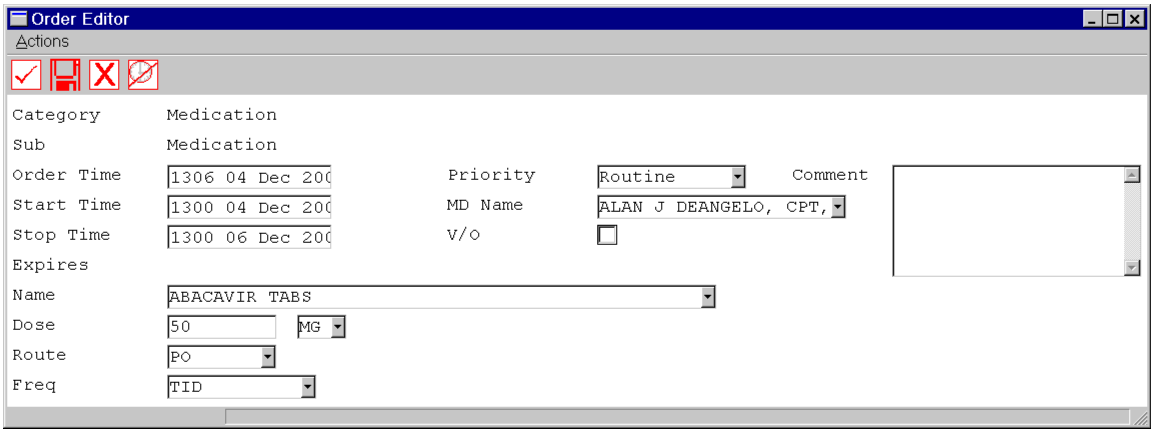



Figure 12-15. Order Editor Screen opened from a Flowsheet

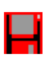
## Actions

The following actions are available from the **Actions** menu and the Icon bar:

### Assign

**Assign** transfers the information on the **Order Editor** form to the OE Application Display. Triple asterisk are shown in one or more columns on the Application Display to indicate that the order is *not* Stored. A new **Order Editor** form using the same Category replaces the completed form. Use **Assign** when additional orders are to be placed from within the same Category.

To change category, **Cancel** the open **Order Editor** form to return to the Flowsheet. Select **New Order** from the **Flowsheet Actions** menu to display the **Category** list.



### Store

**Store** saves the order to the patient record. Whenever an order is created or modified, those changes are temporary until they are Stored. All Active orders with changes pending are processed simultaneously when **Store** is invoked. Orders with changes pending are identified by triple asterisk in one or more columns of the OE Application Display. See "Store" on page 189 for additional information.

### Cancel

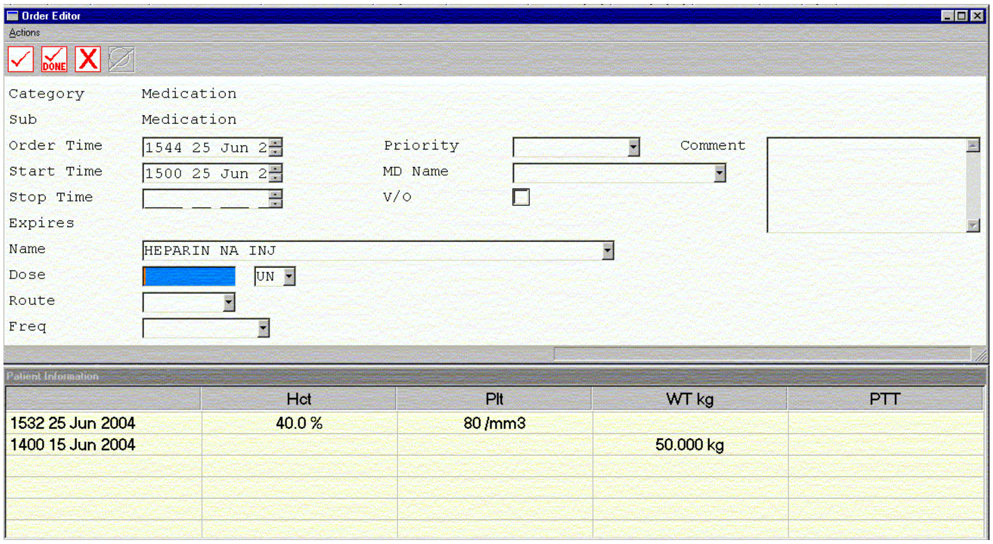
**Cancel** discards any information entered into the **Order Editor** form. If **Cancel** is selected *before* selecting **Assign**, the **Order Editor** form is closed and the display returns to the Flowsheet. If **Cancel** is selected *after* selecting **Assign**, a pop-up message asks if you wish to save your changes.

### Clear Time

**Clear Time** removes the time and date displayed in a Time/Date field.

## Order Editor with Charted Data

A table of selected patient medications data can be configured to display while the Order Editor window is open. Contact CliniComp Client Services to configure this option.




## Standard Order Sets

A Standard Order set is a named collection of orders. Standard Order sets are used to enter a group of orders which are commonly used together as part of a standard treatment regimen. Standard Order sets are typically used either as an all-inclusive group of orders with the entire group assigned to the patient, or cafeteria style where individual items are assigned a la carte.

Standard Order sets straddle the concepts of Display and Content. When a Standard Order is invoked, a view is created containing the orders that comprise the selected set. In many superficial ways, the Standard Order view looks and behaves like any other view created in the OE Application Display. However, it is crucial to recognize that the orders in the Standard Order view are not associated with the patient record until they are Assigned. The Standard Order view is a menu of preconfigured New Orders, rather than a regular view.

Actions available in the Standard Order set view are different than the actions available in other views. The available actions are geared toward modifying the content of the preconfigured New Orders, and assigning those orders to the patient record.

Changes made within the Standard Order view are local to the view while it is open. The next time a given Standard Order set is opened, the orders will have been returned to their original condition. (Modification of Standard Order sets is a System Administrator function, and is beyond the scope of this manual.)

### Edit Order

Order Entry Menu, Shortcut Menu, Ctrl-E

The selected order in the Standard Order set view is opened for editing. Much like the Edit Order action available in other views, an Order Editor form pops up with the information from the selected order pre-loaded into its fields.

Order Editor forms associated with Standard Order sets behave the same way as in other views, except that any modifications remain local to the set view until assigned. Two Actions are available as icons or menu items on the form:

### Done

Order Editor Actions Menu, Shortcut Menu

Use the Done action to complete the editing process of the selected Standard Order. When Done is invoked, the Standard Order view is updated with the modifications, and the form is closed.

### Cancel

Order Editor Actions Menu, Shortcut Menu

Use the Cancel action to abort editing of the selected Standard Order. When Cancel is invoked, the form is closed and the Standard Order view is not modified.

### Start Time

Order Entry Menu, Shortcut Menu

The default start time assigned to all orders in the Standard Order set is the current time. Use the Start Time action to modify the start time of individual or multiple selected items. When invoked, the Start Time form will pop up.

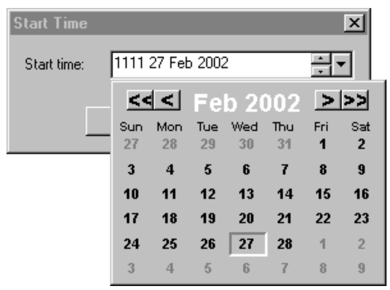



Figure 12-16. Start Time form.

The Start Time form (Figure 12-16.) contains one field:

**Start Time**

When the form is first opened, the Start Time field will be pre-loaded with the current time. To modify the date and/or time, position the mouse pointer over a sub-field and click to select. For example, click on the month to select the month field for editing. Once the cursor is within the time/date field, the right and left arrows on the keyboard can be used to select neighboring sub-fields.

There are several ways to modify the selected sub-field of the date and time:

- Clicking the small up and down arrows at the right of the time/date field
- Pressing the up and down arrows on the keyboard
- Typing on the keyboard (for the month, press the first letter of the desired month to cycle through the months that begin with that letter)

  A date can also be specified using the drop-down calendar. To open the calendar, click the large down arrow at the right of the time/date field.

There are two buttons at the bottom of the Start Time form:

**OK**

When **OK** is chosen, the information on the Start Time form is transferred to the selected order(s) in the Standard Order view. When the Start Time field is transferred, it is rounded back to the previous whole hour.

**Cancel**
Click **Cancel** to discard the Start Time form and return to the Standard Order view.

### Assign Order
Order Entry Menu, Shortcut Menu

Assign the selected orders in the Standard Order view. The selected orders are removed from the Standard Order view, and become New orders in the OE Application Display. When the last order has been Assigned, the empty Standard Order view is removed.

### Assign All Orders
Order Entry Menu, Shortcut Menu

Assigns all orders currently displayed in the Standard Order view. All orders in the Standard Order view become New orders in the OE Application Display, and the empty Standard Order view is removed.

### Remove View
OE Options Menu

See Done.

### Done
Order Entry Menu, Shortcut Menu

Either Done or Remove View can be used to remove the Standard Order view from the OE Application Display without Assigning the orders present in the view.

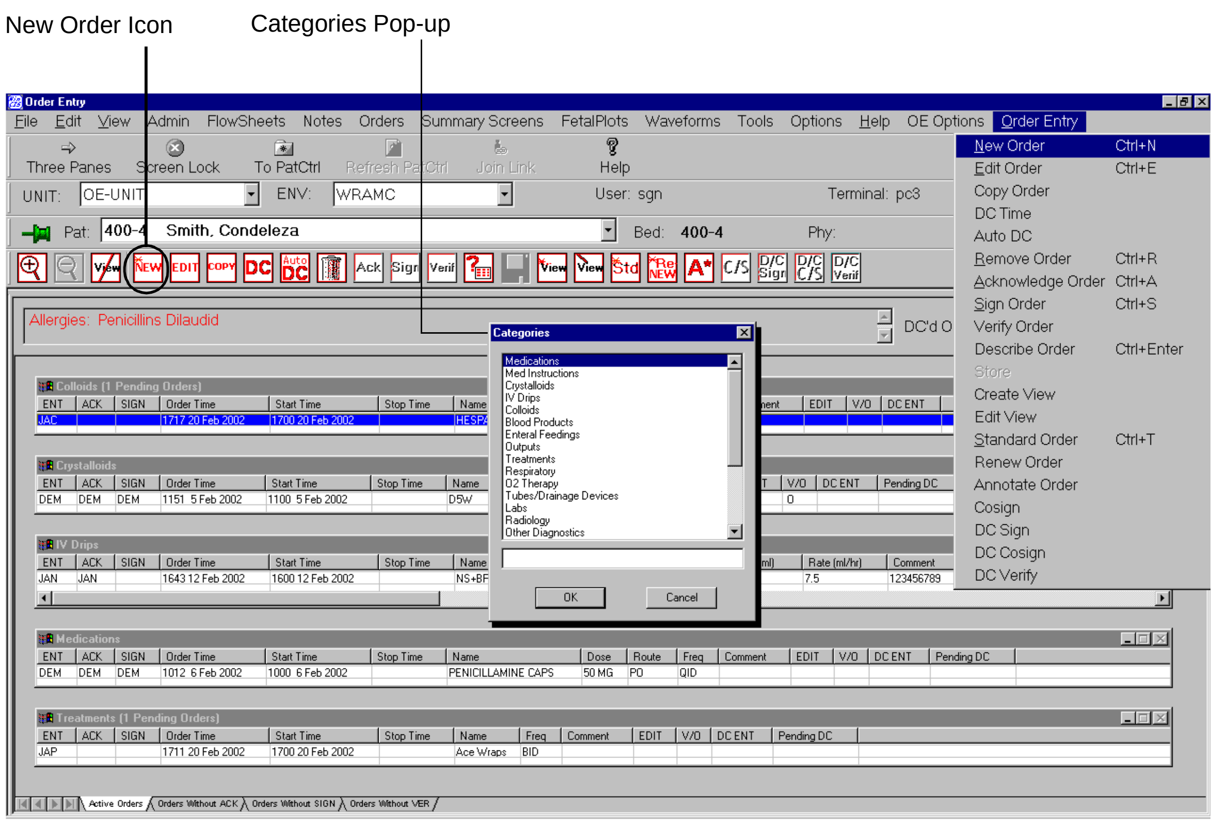
### Remove Order
Order Entry Menu, Shortcut Menu

Removes the selected orders from the Standard Order view.

# Example of a Simple Medication Order

## MD enters the order

| Step by Step | Additional Information |
|---|---|
| 1. Invoke the New Order content action by clicking the icon, selecting it from the Order Entry dropdown menu, or from the shortcut menu. | A list of available categories is displayed in the Order Category Dialog. |
| 2. Select the Medications category from the Categories pop-up. | Some categories include a Subcategory. For example, the Tubes category can be shown as Tubes/Lines and Tubes/Drainage Devices. |
| 3. The Order Editor form configured for the Medications category pops up.<br>4. Select a Medication from the Name choicelist. | The Medication Name Choicelist is generated from the hospital formulary. Please refer to the detailed description and instructions for the Medication Name Choicelist in the section titled Formulary Considerations. |



5. Enter the Dose, Dose Unit, and Route, into their respective fields.

   These three fields, plus the Name, are required in order to Assign a Medication order.

6. When the Order Editor pops up, the Order Time and Start Time fields will be preloaded with the current time. Change the Order Time and Start Time fields as appropriate.

   When Assigned, the Start Time is rounded back to the previous whole hour.

7. If appropriate, enter a Stop Time to place a DC marker on the MAR. In this example, the Stop Time has been left blank.

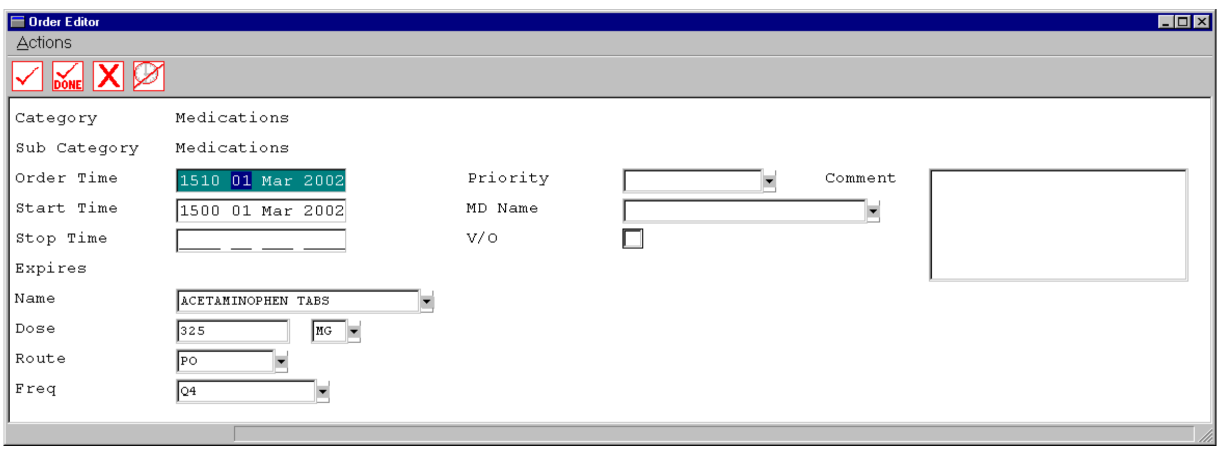
   When Assigned, the Stop Time will be rounded forward to the next whole hour. The Stop Time for meds that expire will be preloaded into the Stop Time field. In this example, Acetaminophen does not expire, and a Stop Time was not manually entered when the order was placed.

8. Enter additional information, such as Frequency, Priority and MD Name, as appropriate.

   Frequency and MD Name may be configured as required fields.

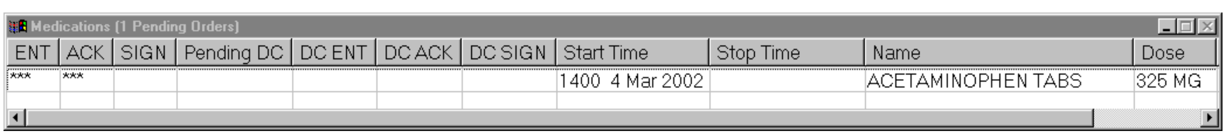
9. Invoke the Done action to place the New Order into the OE Application Display and close the Order Editor.

   Use the Assign action to keep the Order Editor open so that another Medication order can be placed.




10. The new Acetaminophen order appears in the Medications section of the Active Orders view with triple asterisks in the ENT and ACK columns.

    The Medications section heading is updated to indicate the order is Pending.



11. Invoke the Store action. This step assumes that the user who enters the order has typical MD permissions (Enter, Sign, DC).

The triple asterisks are removed from the ENT and ACK columns. Initials of the MD user (SGD in this example) appear in the ENT and SIGN columns. Since the order is not yet acknowledged, it remains Pending.

Medications (1 Pending Orders)

| ENT | ACK | SIGN | Pending DC | DC ENT | DC ACK | DC SIGN | Start Time | Stop Time | Name | Dose |
|---|---|---|---|---|---|---|---|---|---|---|
| SGD | | SGD | | | | | 1400 4 Mar 2002 | | ACETAMINOPHEN TABS | 325 MG |

## RN acknowledges the order

12. Click on the order row to select it, and invoke the Acknowledge Order action.

A triple asterisk appears in the ACK column to indicate that an acknowledgement of the order will be recorded with the next Store.

Medications (1 Pending Orders)

| ENT | ACK | SIGN | Pending DC | DC ENT | DC ACK | DC SIGN | Start Time | Stop Time | Name | Dose |
|---|---|---|---|---|---|---|---|---|---|---|
| SGD | *** | SGD | | | | | 1400 4 Mar 2002 | | ACETAMINOPHEN TABS | 325 MG |

13. Invoke the Store action. This step assumes that the user who acknowledges the order has typical RN permissions (Enter, Acknowledge, DC).

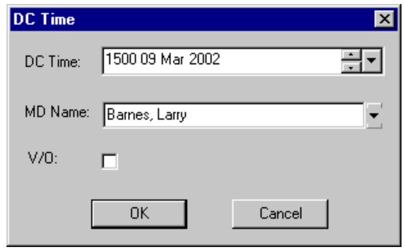
The triple asterisk in the ACK column is replaced by the initials of the RN (SGN in this example). Since the order is now acknowledged, the Pending notification no longer appears in the section header. The order appears on the MAR, and other flowsheets configured to display Medications.

Medications

| ENT | ACK | SIGN | Pending DC | DC ENT | DC ACK | DC SIGN | Start Time | Stop Time | Name | Dose |
|---|---|---|---|---|---|---|---|---|---|---|
| SGD | SGN | SGD | | | | | 1400 4 Mar 2002 | | ACETAMINOPHEN TABS | 325 MG |

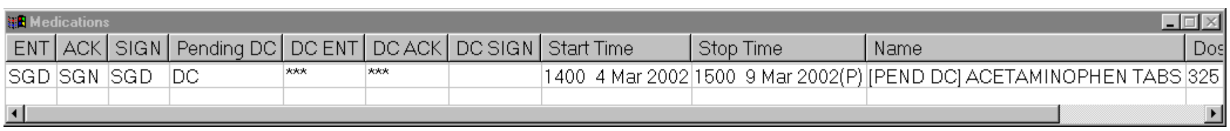
## MD discontinues the order

14. Click on the order row to select it, and invoke the DC Time action.
15. The DC Time form pops up preloaded with the current time.
16. Modify the stop time as appropriate, and select the MD Name.
17. Click OK to accept the DC Time. Since the DC Time action pertains to an acknowledged order, an Order to DC is spawned.




18. In the OE Application Display, the spawned Order to DC is indicated by: triple asterisks in the DC ENT and DC ACK columns; DC in the Pending DC column; P (for pending) to the right of the Stop Time; PEND DC attached as a prefix to the Name.

Until the Order to DC is acknowledged, it will share a row with the original order.



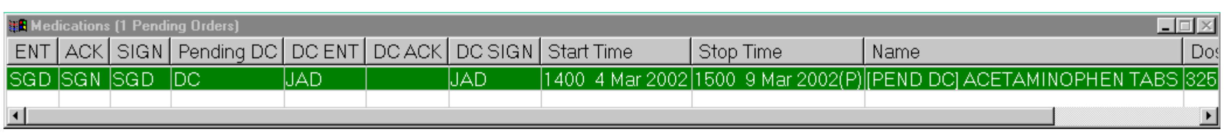
Medications

| ENT | ACK | SIGN | Pending DC | DC ENT | DC ACK | DC SIGN | Start Time | Stop Time | Name | Dos |
|---|---|---|---|---|---|---|---|---|---|---|
| SGD | SGN | SGD | DC | *** | *** | | 1400 4 Mar 2002 | 1500 9 Mar 2002(P) | [PEND DC] ACETAMINOPHEN TABS | 325 |

19. Invoke the Store action. This step assumes that the user who enters the Order to DC has typical MD permissions (Enter, Sign, DC).

The triple asterisks are removed from the DC ENT and DC ACK columns. Initials of the MD user (JAD in this example) appear in the DC ENT and DC SIGN columns. The row is highlighted in Green to further indicate that the order state is Pending DC.

Since the Order to DC was entered by a user with DC permission, a DC marker is added to the flowsheet row. Pending is indicated in the section header since the Order to DC has not been acknowledged.



Medications (1 Pending Orders)

| ENT | ACK | SIGN | Pending DC | DC ENT | DC ACK | DC SIGN | Start Time | Stop Time | Name | Dos |
|---|---|---|---|---|---|---|---|---|---|---|
| SGD | SGN | SGD | DC | JAD | | JAD | 1400 4 Mar 2002 | 1500 9 Mar 2002(P) | [PEND DC] ACETAMINOPHEN TABS | 325 |

## RN acknowledges the order to DC

20. Click on the order row to select it, and invoke the Acknowledge Order action.

A triple asterisk appears in the DC ACK column to indicate that an acknowledgement of the DC will be recorded with the next Store.

Medications (1 Pending Orders)

| ENT | ACK | SIGN | Pending DC | DC ENT | DC ACK | DC SIGN | Start Time | Stop Time | Name | Dos |
|---|---|---|---|---|---|---|---|---|---|---|
| SGD | SGN | SGD | DC | JAD | *** | JAD | 1400 4 Mar 2002 | 1500 9 Mar 2002(P) | [PEND DC] ACETAMINOPHEN TABS | 325 |

21. Invoke the Store action. This step assumes that the user who acknowledges the Order to DC has typical RN permissions (Enter, Acknowledge, DC).

Since the DC is now acknowledged, the Order to DC becomes the Active order, and the original order becomes a Previous order. To see the original order, create a view with Order State equal to Previous. The original order will appear as in Step 13 above.

In the Active Orders view, the row is now occupied solely by the Order to DC. The row is highlighted Yellow to indicate that it contains an acknowledged DC.

From this point forward, the Order to DC will be processed like any order. Hence, the initials in the ENT and SIGN columns are those of the MD who entered and signed the DC (JAD in this example), and the initials in the ACK column are those of the RN who acknowledged the DC (JAN in this example).

The DC Time of this Order to DC can be modified by returning to Step 14. Note that since the Order to DC is acknowledged, another Order to DC must be spawned to accomodate the request.

Medications

| ENT | ACK | SIGN | Pending DC | DC ENT | DC ACK | DC SIGN | Start Time | Stop Time | Name | Dose | Route |
|---|---|---|---|---|---|---|---|---|---|---|---|
| JAD | JAN | JAD | | | | | 1400 4 Mar 2002 | 1500 9 Mar 2002 | ACETAMINOPHEN TABS | 325 MG | PO |

Section

# Drug Screening

14

This module describes using the Order Entry (OE) drug screening facility through the Essentris interface. The drug screening facility checks patient orders in the Order Entry system and issues warnings and descriptions of possible adverse reactions that the clinician can assess.

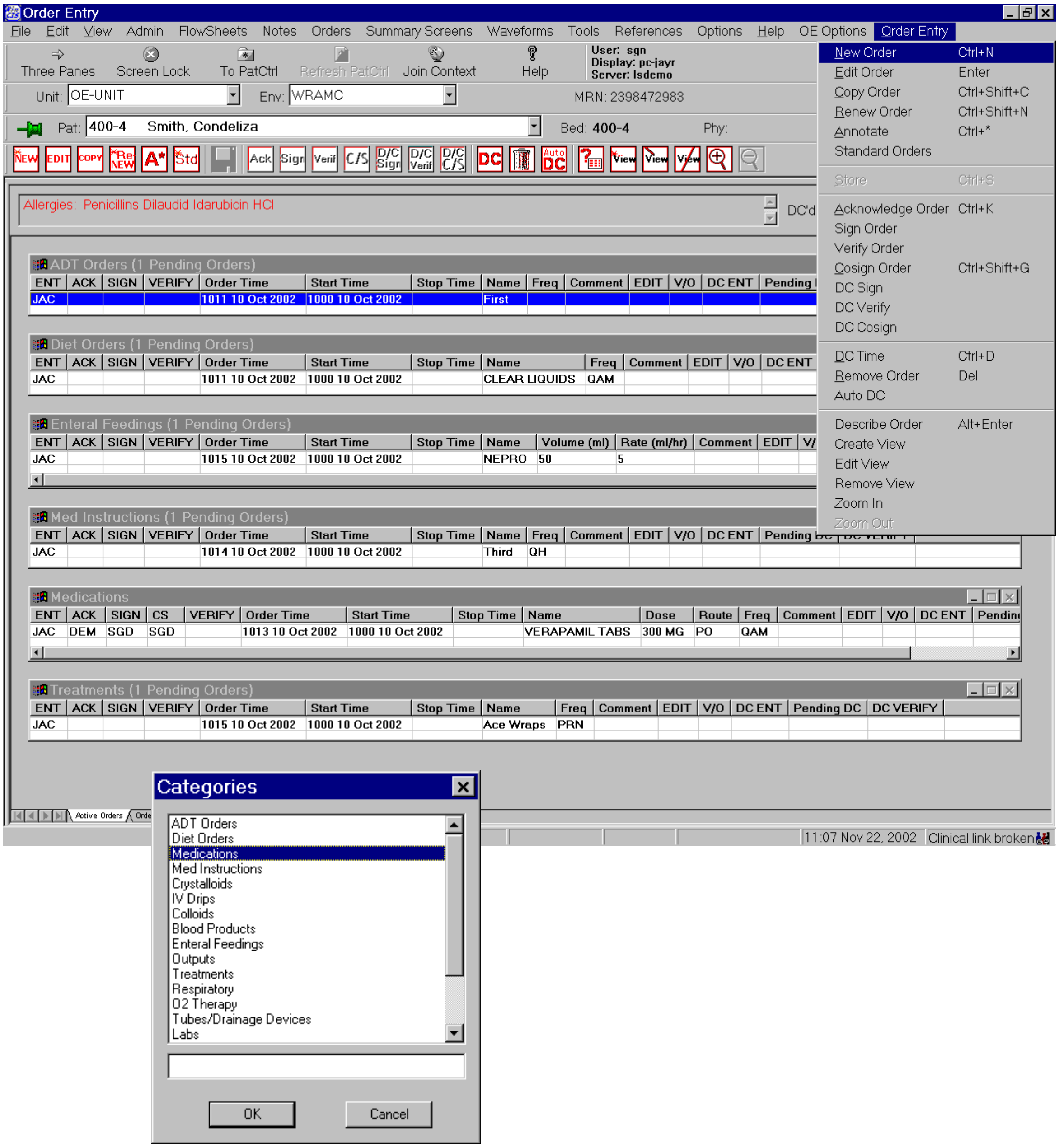
## Drug Screening Process

The following steps describe how to use the drug screening features in the Essentris interface.

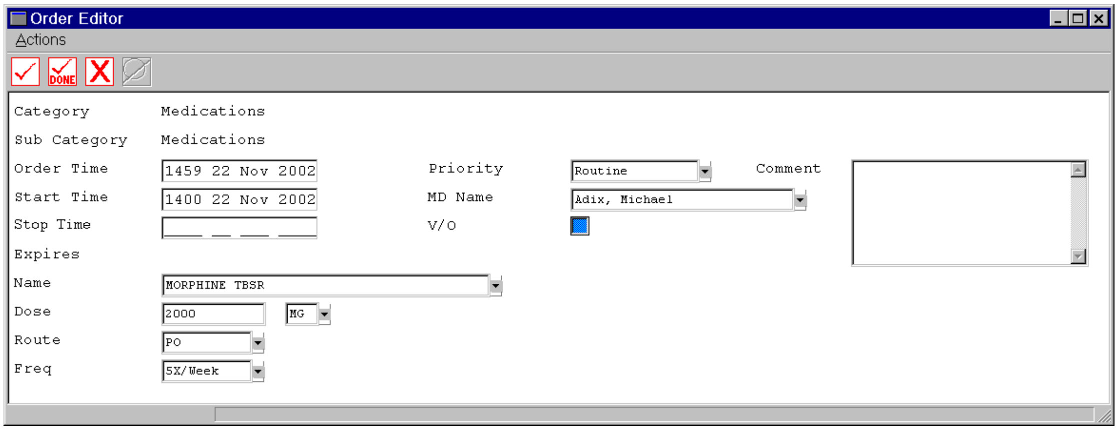
Note

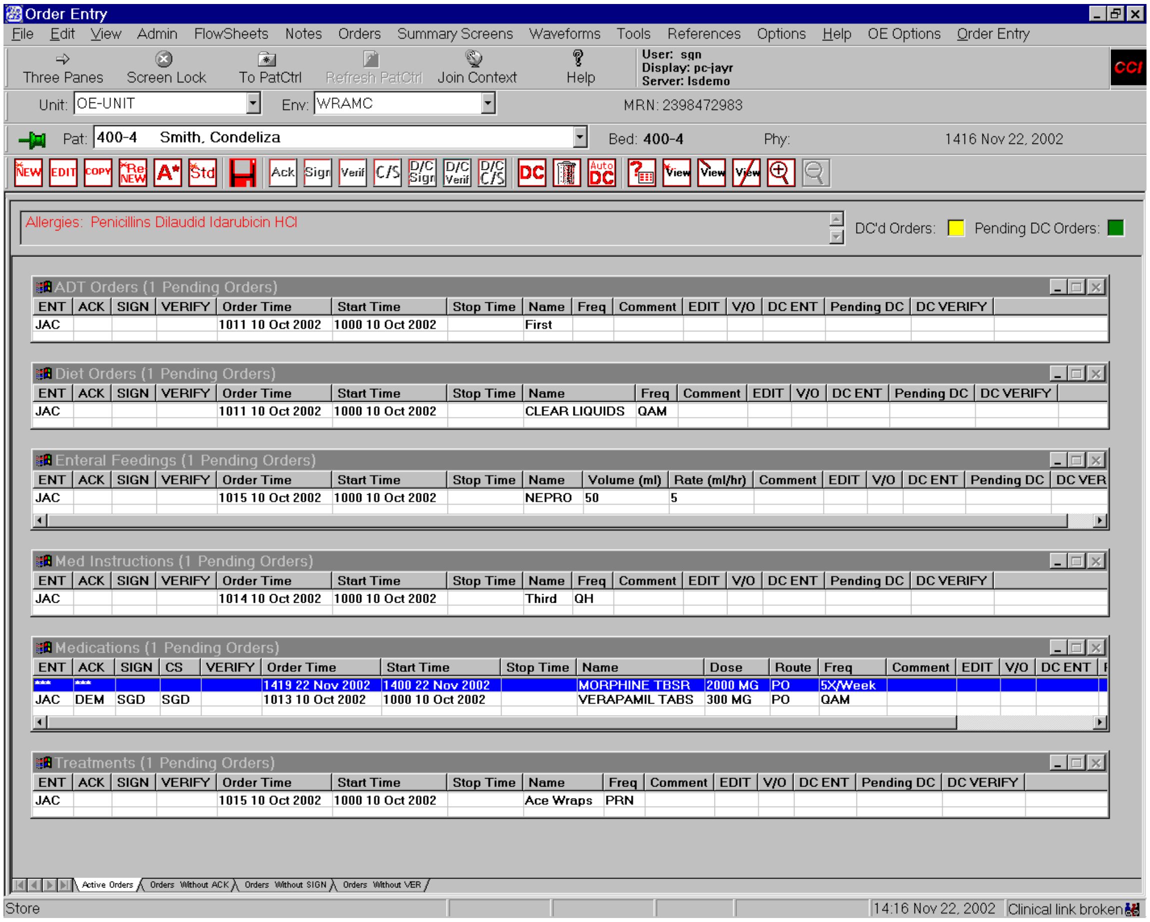
*The patient record must contain the patient's gender, date of birth, and allergy information to display the patient's drug screening assessment.*

| Step by Step | Additional Information |
|---|---|
| 1. In the **Patient Control** screen, select a patient. | |
| 2. Open the **Orders** menu and click **Order Entry**. | The **Order Entry** screen appears. |
| 3. Open the **Order Entry** menu and click **New Order**. | The **Categories** screen appears. |
| 4. Select an order category and click **OK**. | The **Order Editor** screen appears. |


Order Entry
File Edit View Admin FlowSheets Notes Orders Summary Screens Waveforms Tools References Options Help OE Options Order Entry
Three Panes Screen Lock To PatCtrl Refresh PatCtrl Join Context Help
User: sgn
Display: pc-jayr
Server: lsdemo
Unit: OE-UNIT Env: WRAMC MRN: 2398472983
Pat: 400-4 Smith, Condeliza Bed: 400-4 Phy:
Allergies: Penicillins Dilaudid Idarubicin HCl
ADT Orders (1 Pending Orders)
Diet Orders (1 Pending Orders)
Enteral Feedings (1 Pending Orders)
Med Instructions (1 Pending Orders)
Medications
Treatments (1 Pending Orders)
New Order Ctrl+N
Edit Order Enter
Copy Order Ctrl+Shift+C
Renew Order Ctrl+Shift+N
Annotate Ctrl+*
Standard Orders
Store Ctrl+S
Acknowledge Order Ctrl+K
Sign Order
Verify Order
Cosign Order Ctrl+Shift+G
DC Sign
DC Verify
DC Cosign
DC Time Ctrl+D
Remove Order Del
Auto DC
Describe Order Alt+Enter
Create View
Edit View
Remove View
Zoom In
Zoom Out
Categories
ADT Orders
Diet Orders
Medications
Med Instructions
Crystalloids
IV Drips
Colloids
Blood Products
Enteral Feedings
Outputs
Treatments
Respiratory
O2 Therapy
Tubes/Drainage Devices
Labs
OK
Cancel
11:07 Nov 22, 2002
Clinical link broken

| Step by Step | Additional Information |
|---|---|
| 5. Enter the order data in the **Order Editor** screen. | |
| 6. Select **Assign Order** or **Done** to place the order in the patient's **Order Entry** screen. | The **Order Entry** screen appears with the new order. |





| Step by Step | Additional Information |
|---|---|
| 7. From the **Order Entry** menu, or the Icon bar, select **Store** to save the new entry. | The **Validation Dialog** box appears. |
| 8. Enter your User Name and Password and click **OK**. | If the new order causes a warning for a duplicate order, an adverse drug interaction, a drug allergy reaction, or duplicate therapy, the **Order Decision Support** screen from the drug screening facility appears. |

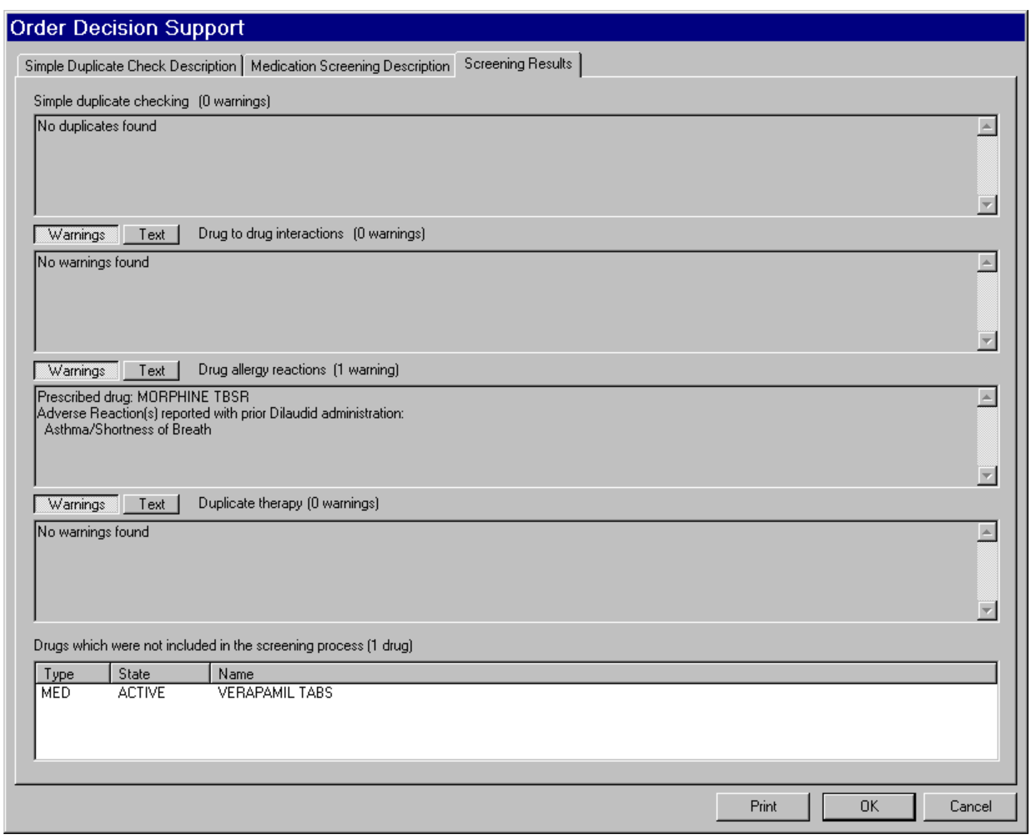
## Drug Screening Results

The **Order Decision Support** screen contains three tabs: Screening Results, Simple Duplicate Check Description, and Medication Screening Description.

Note

*If the patient's gender, date of birth, or allergy information is missing, the Order Decision Support screens contain messages that the patient data is missing. Drug screening results are not displayed.*

### Screening Results Tab



The **Screening Results** tab includes the following types of information:

### *Simple Duplicate Checking*

Displays warnings of duplicate orders, except the excluded order types (see "Excluded Types" on page 214).

### *Drug to Drug Interactions*

Click the **Warning** button to read the warnings on the drug interactions between medications for the selected patient.
Click the **Text** button to read the full description of the drug interaction.

### *Drug Allergy Reactions*

Click the **Warning** button to read the drug-allergy reactions.
Click the **Text** button to read the full description of the drug interaction.

### *Duplicate Therapy*

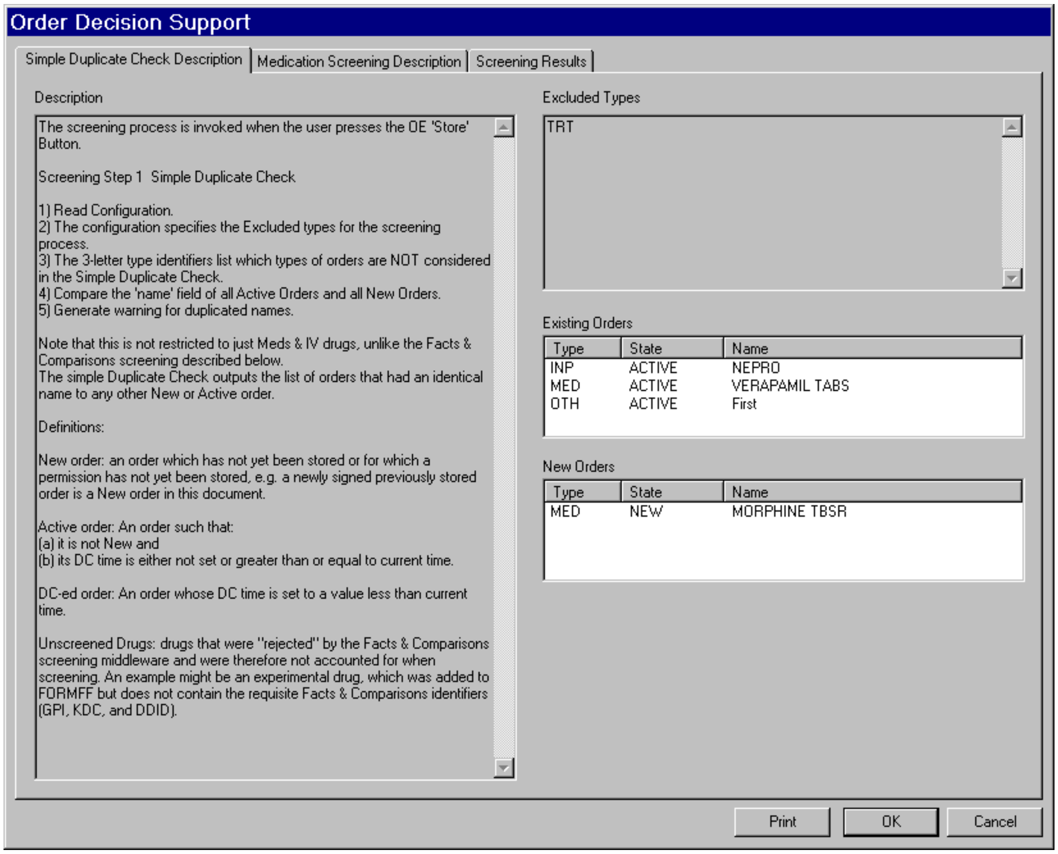
Click the **Warning** button to read the warnings on duplicated therapies.
Click the **Text** button to read the full description about duplicated therapies.

### *Drugs Which Were Not Included in The Screening Process*

Displays drugs that have a system conflict for the following reasons:

- The drug was ordered but was *not* charted on MAR within the last 30 days.
- The drug cannot be found in the formulary (possibly due to conditions such as a change in the formulary, or the drug was entered as free text incorrectly in the **Order Editor** screen).

## Simple Duplicate Check Description Tab




The **Simple Duplicate Check Description** tab displays the following types of information:

### *Description*

Describes the duplicate checking process.

### *Excluded Types*

Lists the order types for the selected patient that are excluded from duplicate checking. Excluded order types are configured by the hospital. The following types can be excluded:

| | |
|---|---|
| MED | Medications |
| IVD | IV Drip |
| TRT | Treatment |
| INP | Inputs |
| OUT | Outputs |
| OTH | Other |

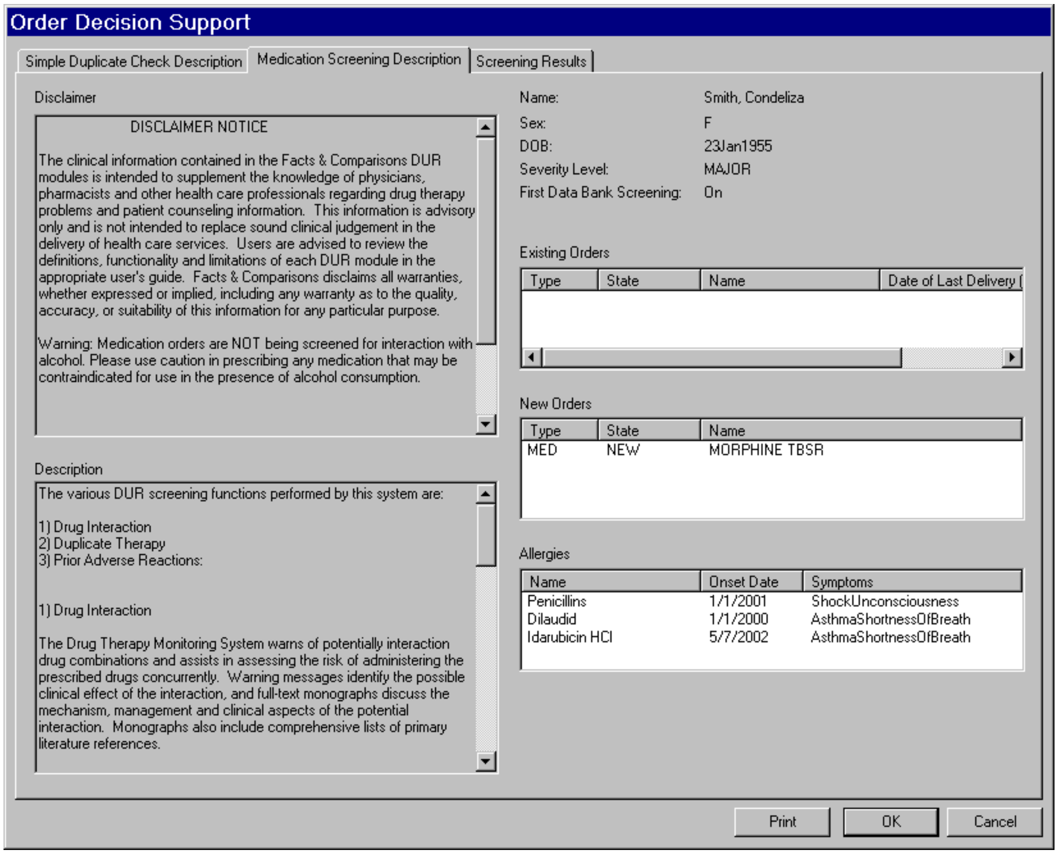
### *Existing Orders*

Lists the active orders for the selected patient. An active order is *not* a new order and if a DC is present, the DC time is greater than or equal to the current time.

### *New Orders*

Lists orders that have been signed, but have *not* been stored, and stored orders that have *not* been signed.

## Medication Screening Description Tab




The **Medication Screening Description** tab displays the selected patient's data and the following information:

### *Disclaimer*

Describes the scope and limitations of the drug-screening system.

### *Description*

Describes the drug-screening system functions.

### *Existing Orders*

Lists the active orders for the selected patient. An active order is *not* a new order and if a DC is present, the DC time is greater than or equal to the current time.

### *New Orders*

Lists orders that have been signed, but have *not* been stored, and stored orders that have *not* been signed.

### *Allergies*

Lists the selected patient's allergies and symptoms.

### *Print Button*

Prints the screening results.

### *OK Button*

Acknowledges warnings and stores the order.

### *Cancel Button*

Returns to the Order Entry screen without storing the order.

## System Support

Contact your technical support person when any of the following conditions occur:

- The **Order Decision Support** screen displays a message stating that the 90-day license has expired.
- The drug-screening system does *not* respond.

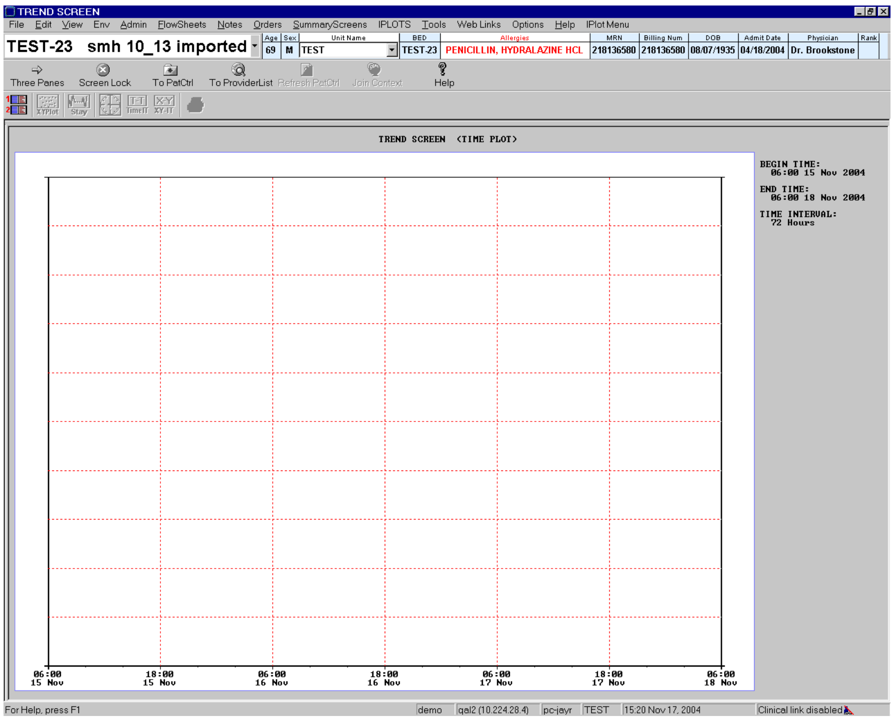
# IPlots

15

Any flowsheet data item can be plotted over time (Time Plot) or against another data item (XY Plot). IPlots are configured on or off, by unit.

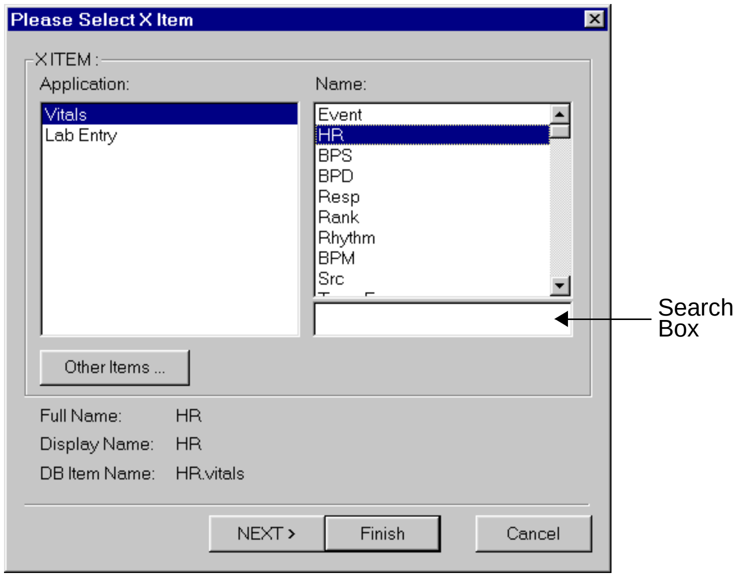
## Accessing IPlots

In the Patient Control screen, select a unit that has IPlots configured on. These units have IPlots menu selections in the Menu bar, the Application bar and the Shortcut menu. Select a patient and click the Plot menu item to open the **Trend Screen**.



## Selecting Data Items

Select the **Select Items** menu option from the **IPlot Menu**, the Shortcut menu, or the **Select Items** icon on the left end of the icon bar (the IPlot icons are described below). The application and data item selection window opens.



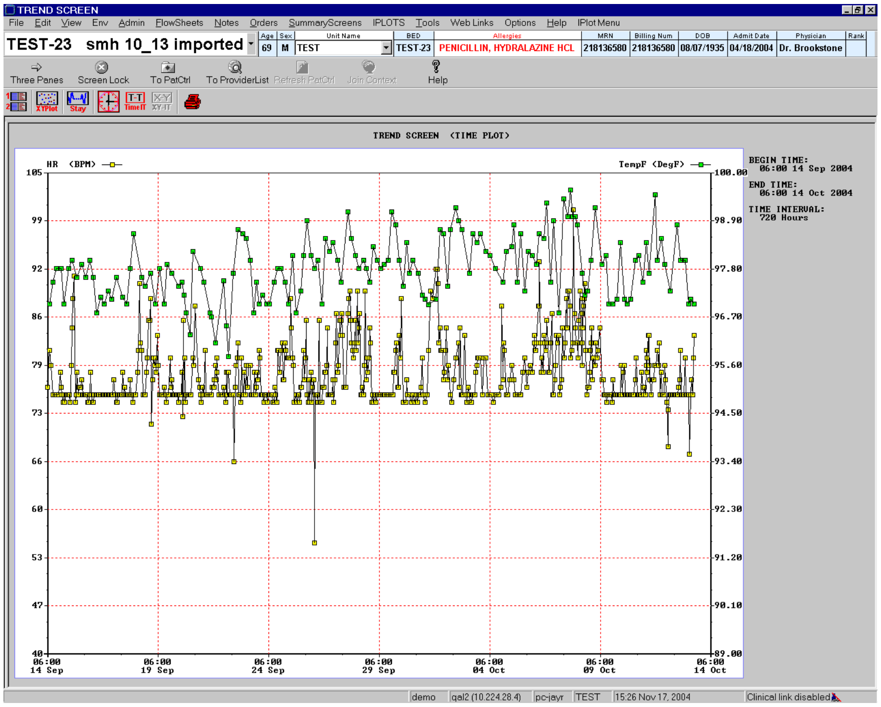

1. Select a flowsheet application from the Application list.
2. Select a data item from the Name list.
3. Optionally, select a second data item by clicking the **Next>** button and repeating steps 1 and 2. This data item is plotted on the Y axis of the XY Plot.
4. Click the **Finish** button to display the plots.

Options:

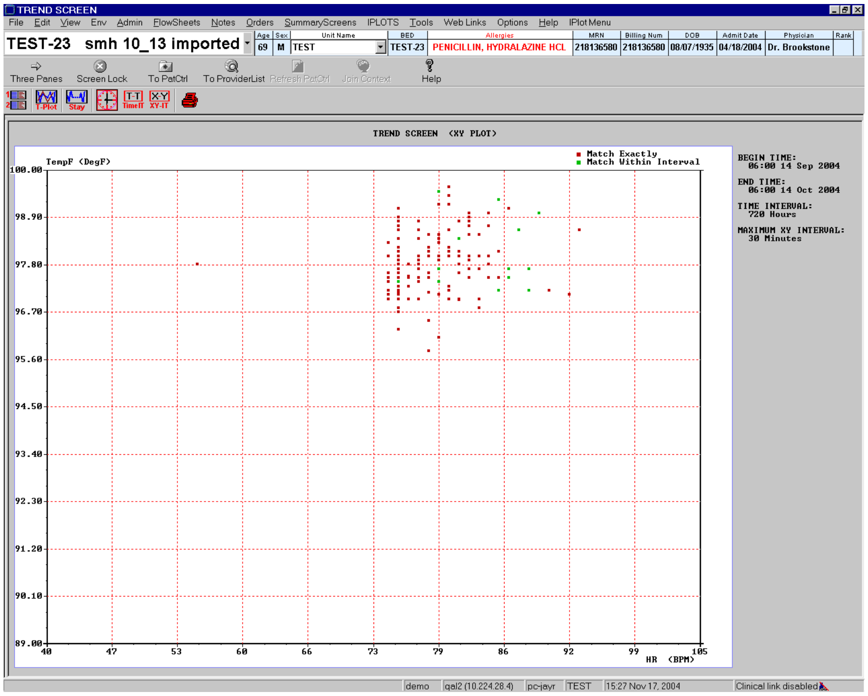
- To search for a data item, key in the beginning letters of item name in the search box. A list of names that contain the text in the search box appears in the Name window.
- To enter a data item that is not in the Name list, click the **Other Items** button to open a text entry box.
- To view a different time section of the patient plot, use the **Enter End Time** option described on page 220.

# Example Plot Screens

**Time Plot** screen displaying two data items:

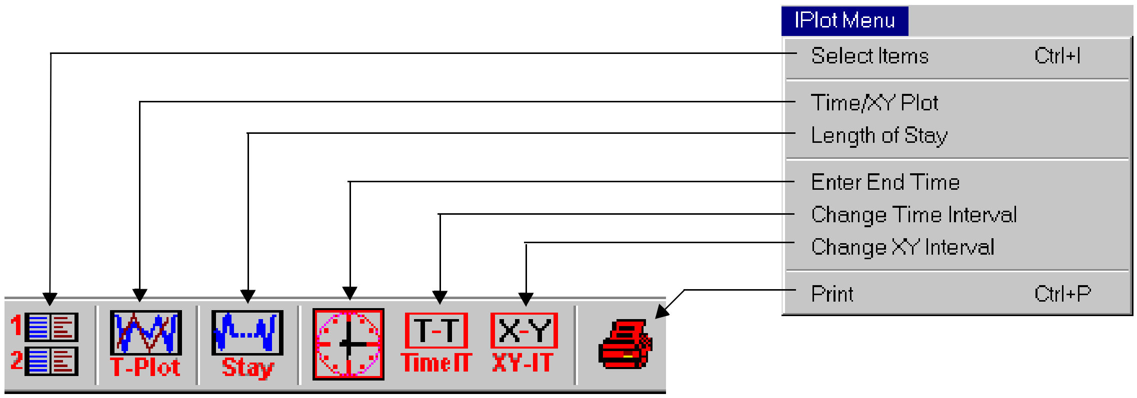


**XY Plot** screen with the same two data items:



## Icons and Menus

The icons shown below represent the menu items on the drop-down **IPlot Menu** and the shortcut menu.




Selecting data items is described in "Selecting Data Items" on p. 218.

## Changing from a Time Plot to the XY Plot

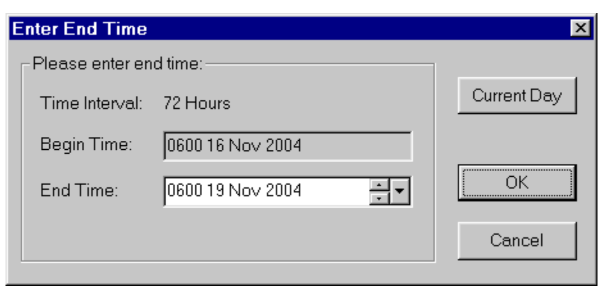
When you are viewing the Time Plot, click on the Time/XYPlot menu option or icon to view the XY Plot. This is a toggle function: while viewing the Time Plot, the icon is labeled XYPlot. While viewing the XY Plot, the icon is labeled T-Plot.

## Plotting the Length of Stay

Use the Length of Stay menu item or the corresponding icon to display the patient's length of stay in the plots.

## Changing the End Time of the Plot

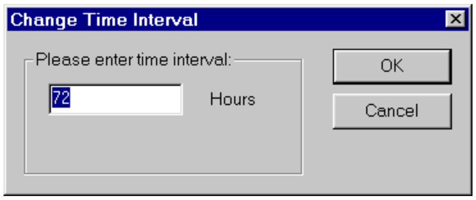
Use the Enter End Time menu item or the corresponding icon to shift the display forward or backward in time. Changing the end time does not affect the time interval.

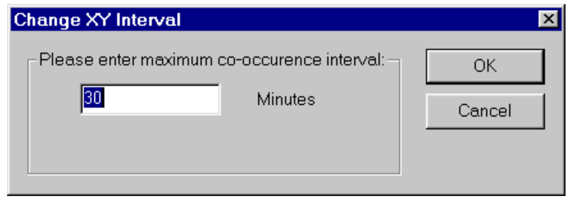



Set the new end time using the spin arrows and calendar button in the **End Time** box, or click the **Current Day** button to enter the current time and date.

## Changing the Time Interval

For the Time Plot, use the Change Time Interval or the corresponding icon to change the length of time of the display. For example, changing the time interval from a 72-hour display to a 48-hour display. Changing the time interval does not change the end time of the display. The same rules apply to the Change XY Interval menu option for the XY Plot.




The **Time Plot** has a default of 72 hours. The **XY Plot** has a default of 30 minutes.

## Printing Plots

Use the Print menu item or the corresponding icon to print a plot to your assigned printer.

## IPlot Options

The following options can be configured by your CliniComp Account Manager.

### Menu Items

- The menu items in the IPlots menu can be labeled with any name.
- The IPlots menu can be configured to *not* show menu items.

### Plot Screen Size

The height of the screen can be configured. The default size is 20 lines.

# Index

# O



# P



# R



# S



# T



# U

# V



# W